Sportswear, Casual Wear, Separates and Jeans (Women's, Misses' and Juniors')

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS........ 1
GENERAL STATISTICS ON THE INDUSTRY........ 1
  EMPLOYMENT & EARNINGS........ 4
  CONCENTRATION IN THE INDUSTRY........ 5
  OPERATING RATIOS........ 7
  THE INDUSTRY BY REGION........ 7
PRODUCTION........ 9
SHIPMENTS........ 16
PRODUCER PRICE INDEXES........ 19
FOREIGN TRADE -- IMPORTS........ 20
FOREIGN TRADE -- EXPORTS........ 25

AT THE RETAIL LEVEL

THE POTENTIAL MARKET........ 26
RETAIL SALES........ 28
RETAIL SALES BY STORE TYPE........ 29
RETAIL ADVERTISING BY MONTH........ 36
CONSUMER PRICES........ 36
CONSUMER BUYING HABITS........ 37

SCHEDULE OF ADDITIONAL FACT FILES........ 42

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-424-4

Printed in the United States of America

SPORTSWEAR, CASUALWEAR, SEPARATES & JEANS

Market Trends

After modest gains in 1981, the women's sportswear industry is suffering in the current recession which has affected almost every segment of the U.S. economy. Industry analysts report that over the first six months of 1982, unit consumption of women's sportswear has barely held even with that of last year. This has forced retailers to reevaluate their marketing strategies with most responding by shifting their emphasis towards the more affluent, up-scale customer whose purchasing power has not been severely eroded by the down swing in the economy.

Of all categories of sportswear, active wear has turned in the best performance in recent years. Benefiting from the fitness and health craze which has swept the country, active wear sales (both men's and women's) have doubled from an estimated $3 billion in 1977 to $6 billion in 1981. With nearly half of all adult Americans presently engaged in some sort of sport or fitness activity on a regular basis, the outlook for continued growth in the active wear field remains good for the foreseeable future.

It is now a commonly accepted fact that the jeans market is a mature one and the phenomenal growth that had been registered by the group in the past will not recur in the near term unless new, unforeseen circumstances are introduced into the market (such as designer jeans in the 1970's). It is now believed (WWD, September 9, 1982) that it will take until 1985 before U.S. consumption reattains its 1981 sales peak of 525 million units (men's & women's). Recent reports on jeans sales (WWD, September 14, 1982) indicate that the group is showing increased sales for the first time in nearly a year, during the fall 1982 season. Retailers report that renewed interest in the classic jean as well as new styles of jeans are fueling this upswing.

While many traditional sportswear firms are diversifying into other areas in order to maintain sales, others, particularly designer jean companies, are licensing their names to other companies in order to offset declines in sales of their own companies products. Although no reliable figures are available for licensed sales of women's sportswear alone, overall licensing, (both men's and women's apparel) account for $13.7 billion in sales presently and this figure is expected to grow to $75 billion by 1990.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census -- the most recent covering the year 1977. During the intercensual period, annual surveys are conducted by the Bureau among a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity, and these estimates have now been published for the years 1978, 1979, and 1980.

Between 1979 and 1980 the value added by manufacturers of women's, misses' and juniors' outerwear increased 19.1% while value added to materials of knit outerwear mills was up 22.2%. In the blouse segment of the women's sportswear industry, value added by the manufacturer was up only minimally (2.6%).

GENERAL STATISTICS ON THE INDUSTRY

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	1,291	--
Number of establishments, total**	na	1,502#	1,018#	1,415	--
Employees, total (thous.)	84.1	85.1	78.8	83.3	- 1.2%
Production workers (thous.)	72.6	73.9	70.7	73.8	- 1.8
Payroll (mil. $)	$716.6	$689.2	$587.7	$569.0	+ 4.0
Value added by manufacture, (mil. $)##	1,418.9	1,383.5	1,410.6	1,192.5	+ 2.6
Value of industry shipments, (mil. $)###	2,715.5	2,673.1	2,613.0	2,333.6	+ 1.6
Capital expenditures, new (mil. $)	34.3	32.8	27.3	24.0	+ 4.6

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	1,626	--
Number of establishments, total**	na	1,610#	1,435#	1,794	--
Employees, total (thous.)	117.9	109.4	106.4	104.1	+ 7.7%
Production workers (thous.)	102.6	94.6	92.3	87.9	+ 8.5
Payroll (mil. $)	$960.0	$827.4	$777.7	$732.7	+ 16.0
Value added by manufacture, (mil. $)##	2,000.4	1,679.7	1,855.0	1,574.0	+ 19.1
Value of industry shipments, (mil. $)###	3,994.3	3,399.6	3,573.1	3,285.1	+ 17.5
Capital expenditures, new (mil. $)	52.4	44.9	42.3	42.4	+ 16.7

Knit Outerwear Mills (SIC 2253*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	902	--
Number of establishments, total**	na	884#	782#	953	--
Employees, total (thous.)	67.1	61.9	72.1	73.0	+ 8.4%
Production workers (thous.)	57.9	53.4	62.8	62.7	+ 8.4
Payroll (mil. $)	$637.4	$548.1	$608.5	$582.0	+ 16.3
Value added by manufacture, (mil. $)##	1,339.1	1,096.0	1,202.8	1,159.5	+ 22.2
Value of industry shipments (mil. $)###	2,571.7	2,220.8	2,333.3	2,335.9	+ 15.8
Capital expenditures, new (mil. $)	48.5	35.6	44.2	49.9	+ 36.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

na = not available
n.e.c. = not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture or women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric, also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate figures not available as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. This SIC is covered in the Women's Coats and Suits Fact File.

**Each business location is counted as a separate establishment.

# Covers establishments with paid employees only, as reported in County Business Patterns.

\#\#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

\#\#\#Value of industry shipments represents the net selling values, f.o.b. plant, after discount and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales).
The total value of specific products shipped by both manufacturers classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered in the following section for the latest year available compared with the previous year, based on a sample survey.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Annual Survey of Manufactures, 1979, 1980,
County Business Patterns, 1978, 1979.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Current information on employment and earnings in the women's sportswear industry is published by the U.S. Bureau of Labor Statistics. According to this source, knit outerwear mills and women's, misses' and juniors' outerwear manufacturers registered small increases in employment in 1981 (3.2% and 1.9%, respectively) while the blouse segment held relatively even, with an increase of only 1,000 employees (0.2%). However average weekly earnings of production workers in all three segments of the industry rose during this same period.

Over the first four months of 1982, the industry has undergone a major contraction. Employment in every segment has declined by at least 4.3% while production worker hours have also declined with the largest declines in knit outerwear mills and women's, misses' and juniors' outerwear.

Employment & Earnings in Selected Women's Sportswear Manufacturing

	January - April Average			Annual Average		
	1982	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Women's, misses' & juniors' blouses (SIC 2331*):						
All employees (thous.)	59.2	62.7	- 5.6%	62.4	62.3	+ 0.2%
Production workers (thous.)	51.1	54.9	- 6.9	54.4	54.1	+ 0.6
Average weekly earnings	$158.40	$154.17	+ 2.7	$158.10	$146.97	+ 7.6
Average weekly hours	33.0	33.7	- 2.1	34.0	34.1	- 0.3
Average overtime hours	0.8	0.8	--	0.9	0.8	+ 12.5
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*):						
All employees (thous.)	141.6	148.5	- 4.6	147.1	144.4	+ 1.9
Production workers (thous.)	119.0	123.1	- 3.3	122.6	120.4	+ 1.8
Average weekly earnings	$163.68	$165.86	- 1.3	$166.47	$153.97	+ 8.1
Average weekly hours	33.2	35.1	- 5.4	34.9	34.6	+ 0.9
Average overtime hours	1.0	1.1	- 9.1	1.1	1.0	+ 10.0
Knit outerwear mills (SIC 2253*):						
All employees (thous.)	66.5	69.2	- 3.9	71.5	69.3	+ 3.2
Production workers (thous.)	55.9	58.7	- 4.8	60.7	59.4	+ 2.2
Average weekly earnings	$184.85	$184.86	--	$188.87	$179.63	+ 5.1
Average weekly hours	5.24	4.96	+ 5.6	37.4	38.3	- 2.3
Average overtime hours	35.3	37.3	- 5.4	2.1	2.5	- 16.0

n.e.c. = not elsewhere classified
* = for definition of SIC Codes, see page 3

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, June 1982, July 1982,
Revised Establishment Data, June 1982

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The vast majority of establishments in the women's sportswear and separates industries are concentrated in small firms with less than 100 employees. In 1977, in the women's, misses' and juniors' blouse industry only 15.6% of all establishments had more than 100 employees as compared with 16.6% in knit outerwear mills and 18.0% in the women's, misses' and juniors' outerwear segments.

Of reported segments of sportswear manufacturing industries, the biggest concentration is noted among knit outerwear mills. The eight largest companies accounted for 27% of total shipments by knit outerwear mills in 1977. Comparable figures for other segments of women's sportswear manufacturing were 15.2% for blouses, 17.8% for outerwear (as defined in the Standard Industrial Classification system).

The Women's Sportswear Industry by Employment Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of total	Number (Thous.)	% of total	Mil. $	% of total
Women's, misses' & juniors' blouses (SIC 2331*) total	1,502	100.0%	88.3	100.0%	$680.9	100.0%
By establishment size:						
Under 10 employees	331	22.0	(D)	--	(D)	--
10 to 19 employees	216	14.4	3.6	4.1	34.1	5.0
20 to 49 employees	398	26.5	14.5	16.4	113.6	16.7
50 to 99 employees	322	21.4	24.1	27.3	172.5	25.3
100 or more employees	235	15.6	(D)	--	(D)	--
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*) total	1,610	100.0%	106.4	100.0%	$837.0	100.0%
By establishment size:						
Under 10 employees	361	22.4	(D)	--	(D)	--
10 to 19 employees	213	13.2	3.7	3.5	32.4	3.9
20 to 49 employees	454	28.2	16.5	15.5	124.4	14.9
50 to 99 employees	292	18.1	21.6	20.3	162.4	19.4
100 or more employees	290	18.0	(D)	--	(D)	--
Knit outerwear mills (SIC 2253*) total	884	100.0%	66.1	100.0%	$609.1	100.0%
By establishment size:						
Under 10 employees	258	29.2	1.1	1.7	20.6	3.4
10 to 19 employees	167	18.9	2.6	3.9	31.0	5.2
20 to 49 employees	209	23.6	7.3	11.0	65.0	10.7
50 to 99 employees	103	11.7	7.4	11.2	62.0	10.2
100 or more employees	147	16.6	47.7	72.2	430.5	70.7

D = Withheld to avoid disclosure.
n.e.c. = not elsewhere classified
* = For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census, *County Business Patterns*, 1979

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Concentration in the Industry by Company Size, 1977

	Companies	Establishments	Employees	(Mil. $) Shipments
Women's, misses' & juniors' blouses, total	1,292	1,415	83,300	$1,192.5
Percent accounted for by:				
4 largest companies	0.3%	0.9%	3.7%	10.2%
8 largest companies	0.6	1.6	6.3	15.2
20 largest companies	1.5	4.2	13.8	23.9
50 largest companies	3.8	8.2	22.9	39.2
All other companies	96.2	91.8	77.1	60.8
Women's, misses' & juniors' outerwear, total	1,625	1,794	104,100	$1,574.0
Percent accounted for by:				
4 largest companies	0.2%	2.2%	10.3%	11.7%
8 largest companies	0.4	3.5	14.9	17.8
20 largest companies	1.1	4.8	20.7	34.3
50 largest companies	2.9	8.1	30.7	49.2
All other companies	97.1	91.9	69.3	50.8
Knit outerwear mills, total	903	953	73,000	$2,335.9
Percent accounted for by:				
4 largest companies	0.4%	0.9%	10.7%	17.0%
8 largest companies	0.8	1.6	16.6	27.0
20 largest companies	2.1	3.8	35.7	45.6
50 largest companies	5.4	8.8	50,4	62.6
All other companies	94.6	91.2	49.6	37.4

Source: U.S. Bureau of the Census,
Concentration Ratios in Manufacturing,
Census of Manufactures, 1977, MC77-SR-9.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Key Business Ratios in the Women's, Misses' & Juniors' Sportswear Industry, 1980, Median Results

	Women's, Misses' & Juniors' Blouses	Women's, Misses' & Juniors' Outerwear	Knit Outerwear Mills
Number of manufacturers reporting	285	386	180
Current assets to current debt (times)	1.75	2.85	1.82
Net profits to net sales (percent)	2.37	2.79	1.82
Net profits to net worth (percent)	21.04	23.04	13.55
Net sales to net worth (times)	8.13	7.49	6.31
Net sales to net working capital (times)	9.14	7.89	7.32
Average collection period (days)	34	39	30
Net sales to inventory (times)	11.3	8.5	10.8

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
1980 Key Business Ratios,
(All Rights Reserved)

By Region

New York was the major producing state for all three categories of women's sportswear in 1977, according to the U.S. Bureau of the Census. This one state accounted for over 50% of all plants producing knit outerwear in that year while also representing 33.0% of those making women's, misses' and juniors' outerwear and 24.9% of all blouse producing establishments. California had the second largest number of blouse and outerwear plants while New Jersey was second in the knit outerwear mill category.

New York also ranked first in employment in the women's, misses' and juniors' outerwear and knit outerwear categories while Pennsylvania was ranked first in employment of women's, misses' and juniors' blouse workers.

Women's, Misses' & Juniors' Sportswear Industries By Leading States, 1977

	Number of Establishments		Employees	
	Total	20 or more Employees	Thousands	% of total
Women's, misses' & juniors' blouse industry (SIC 2331*)				
U.S. Total	1,415	952	83.3	100.0%
Leading States:				
New York	353	197	12.4	14.9
California	293	151	10.9	13.1
Pennsylvania	277	249	20.0	24.0

(continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

Women's, Misses' & Juniors' Sportswear Industries By Leading States, 1977 (continued)

	Number of Establishments		Employees	
Women's, misses' & juniors' blouse industry (SIC 2331*) (cont'd.)	Total	20 or more Employees	Thousands	% of total
Leading States:				
New Jersey	79	50	3.0	3.6%
Florida	66	34	2.8	3.4
Texas	41	21	2.3	2.8
North Carolina	40	31	5.0	6.0
South Carolina	37	33	4.3	5.2
Georgia	34	28	3.5	4.2
Virginia	27	26	4.1	4.9
All other states	168	132	15.0	18.0
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*)				
U.S. Total	1,794	1,064	104.1	100.0%
Leading States:				
New York	592	313	21.2	20.4
California	314	156	14.1	13.5
Pennsylvania	128	91	8.9	8.5
Florida	100	45	3.3	3.2
New Jersey	97	57	4.0	3.8
Massachusetts	59	40	2.9	2.8
North Carolina	56	39	5.8	5.6
Texas	55	46	7.2	6.9
Georgia	51	40	4.0	3.8
Tennessee	34	27	5.0	4.8
All other states	308	210	27.7	26.6
Knit outerwear mills, (SIC 2253*)				
U.S. Total	953	551	73.0	100.0%
Leading States:				
New York	477	254	17.5	24.0
New Jersey	98	51	4.2	5.8
Pennsylvania	84	67	12.6	17.2
California	73	33	2.5	3.4
North Carolina	45	30	8.2	11.2
Florida	24	13	2.5	3.4
Massachusetts	21	16	2.6	3.6
Ohio	11	7	(D)	--
Virginia	10	10	7.1	9.7
South Carolina	10	7	(D)	--
All other states	100	63	na	na

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

By Region

(footnotes for previous table)

* = See page 3 for definitions of these classifications.
n.e.c. = not elsewhere classified
na = not available
(D) = Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

PRODUCTION

According to preliminary figures on the production of women's apparel in 1982, issued by the National Cotton Council of America, only the sweater and pants categories registered declines in unit production between 1980 and 1981.

The latest government data on cuttings of women's sportswear are from the Census Bureau's Current Industrial Reports series, based on a sample survey, covering the year 1980. In that year the largest increase in production was recorded by separate tailored suit-type jackets whose cuttings were up 16.8% over the previous year. A close second was the sweatshirt group which increased 13.4% over 1979 production of 7,344,000 units.

The biggest loser of production between 1979 and 1980 was the vests, except sweater vests category whose cuttings fell by over a third to 1,377,000 units.

U.S. Production of Women's, Misses' & Juniors' Sportswear 1979 - 1981(p)
(In Thousands of Units)

	1981(p)	1980	1979	% Change 1981/1980	% Change 1980/1979
Reported sportswear items:					
Tops:					
Blouses & shirts, exc. knit sports shirts	474,900	320,448	330,096	+ 6.4%	- 2.9%
Knit sports shirts		126,036	128,496		- 1.9
Sweaters	51,108	53,040	58,800	- 3.6	- 9.8
Pullovers	40,140	41,376	45,828	- 3.0	- 9.7
Coat & cardigan	10,968	11,664	12,972	- 6.0	- 10.1
Jackets	23,436	22,383	19,378	+ 4.7	+ 15.5
Separates tailored suit-type	21,132	20,131	17,238	+ 5.0	+ 16.8
Nontailored outer jacket	2,304	2,252	2,140	+ 2.3	+ 5.2
Vests, exc. sweater vests	1,344	1,377	2,159	+ 2.4	- 36.2
Bottoms:					
Skirts	78,576	70,152	67,003	+ 12.0	+ 4.7
Pants, total	216,120	231,207	222,847	- 6.5	+ 3.8
Slacks, exc. jeans & dungarees	152,760	160,801	156,358	- 5.0	+ 2.8
Jeans & dungarees	63,360	70,406	66,489	- 10.0	+ 5.9

(continued)

PRODUCTION

U.S. Production of Women's, Misses' & Juniors' Sportswear 1979 - 1981(p)
(In Thousands of Units)
(continued)

	1981(p)	1980	1979	% Change 1981/1980	% Change 1980/1979
Active Sportswear:					
Athletic shorts, inc. jogging shorts, tennis shorts, tennis skirts, etc.	2,508	2,388	2,412	+ 5.0%	- 1.0%
Sweatshirts	9,156	8,328	7,344	+ 9.9	+ 13.4
Warm-up or jogging suits	5,628	5,364	5,976	+ 4.9	- 10.2
Swimwear	26,724	25,452	26,808	+ 5.0	- 5.1
Skiwear, inc. jackets & pants whether sold separately or as a unit	na	2,172	2,184	--	- 0.5
Playgarments:					
Shorts, exc. jogging & tennis	29,592	28,188	25,632	+ 5.0	+ 10.0
Playsuits, beach tops, halters & other playgarments	5,028	4,788	5,460	+ 5.0	- 12.3

(p) = preliminary

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear (MA-23F(80)-1).

National Cotton Council of America,
Cotton Counts Its Customers (1982 Edition).

By Fabric/Construction

The distribution of 1979 and 1980 cuttings of women's sportswear and separates by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)

	1980	1979	% Change 1980/1979
Blouses & shirts, exc. knit outerwear sport shirts, total	320,448	330,096	- 2.9%
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	35,532	32,112	+ 10.7
All man-made & chiefly man-made	136,620	132,096	+ 3.4
All wool & chiefly wool	9,312	2,568	na
All other fabric		6,780	na

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980

(Thousands of Units)
(continued)

Blouses & shirts, exc. knit outerwear sport shirts (cont'd.)	1980	1979	% Change 1980/1979
By fabric:			
Knit fabric			
All cotton & chiefly cotton	14,148	13,200	+ 7.2%
All man-made & chiefly man-made	87,420	107,184	- 18.4
All wool & chiefly wool	3,576	1,860	na
All other fabric		2,124	na
Fabric, n.s.k.	33,840	32,172	+ 5.2
Knit outerwear sport shirts, exc. sweater shirts, total	126,036	128,496	- 1.9
By fabric:			
All cotton & chiefly cotton	29,088	38,292	- 24.0
All man-made and chiefly man-made	88,248	83,772	+ 5.3
All wool & chiefly wool	1,008	984	+ 2.4
All other fabrics			
Fabrics, n.s.k.	7,692	5,448	+ 41.2
Pullover sweaters, total	41,376	45,828	- 9.7
By fabric:			
All cotton & chiefly cotton	2,688	2,916	- 7.8
All man-made & chiefly man-made	29,196	34,128	- 14.5
All wool & chiefly wool	3,492	4,188	- 16.6
Fabric, n.s.k.	6,000	4,596	+ 30.5
Coat & cardigan sweaters, total	11,664	12,972	- 10.1
By fabric:			
All cotton & chiefly cotton	11,292	12,696	- 11.1
All man-made & chiefly man-made			
All wool & chiefly wool	372	276	+ 34.7
Separate tailored suit-type jackets, total	20,131	17,238	+ 16.8
By construction:			
Woven fabric	11,828	8,413	+ 40.6
Knit fabric	6,916	7,843	- 11.8
Construction, n.s.k.	1,387	982	+ 41.2
By fabric:			
All cotton & chiefly cotton	1,321	1,292	+ 2.2
All man-made & chiefly man-made	13,323	11,913	+ 11.8
All wool & chiefly wool	3,859	2,966	+ 30.1
All other fabrics	260	94	+176.6
Fabrics, n.s.k.	1,368	973	+ 40.6

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980

(Thousands of Units)
(continued)

	1980	1979	% Change 1980/1979
Nontailored outer jackets, exc. ski, total	2,252	2,140	+ 5.2%
By construction:			
Woven fabric	1,739	1,585	+ 9.7
Knit fabric	351	302	+ 16.2
Construction, n.s.k.	162	253	- 36.0
By fabric:			
All cotton & chiefly cotton	307	388	- 20.9
All man-made & chiefly man-made	1,581	1,293	+ 22.3
All wool & chiefly wool All other fabrics	201	242	- 16.9
Fabrics, n.s.k.	163	217	- 24.9
Vests, exc. sweater vests, total	1,377	2,159	- 36.2
By construction:			
Woven fabric	738	940	- 21.5
Knit fabric	488	1,152	- 57.6
Construction, n.s.k.	151	67	+125.4
By fabric:			
All cotton & chiefly cotton	130	301	- 56.8
All man-made & chiefly man-made	1,025	1,759	- 41.7
All wool & chiefly wool	50	52	- 3.8
All other fabrics	13	9	+ 44.4
Fabrics, n.s.k.	159	38	+318.4
Shirts, total	70,152	67,003	+ 4.7
By construction:			
Woven fabric	40,736	38,649	+ 5.4
Knit fabric	23,797	22,762	+ 4.5
Construction, n.s.k.	5,619	5,592	+ 0.5
By fabric:			
All cotton & chiefly cotton	7,609	7,799	- 2.4
All man-made & chiefly man-made	47,404	45,807	+ 3.5
All wool & chiefly wool	8,034	6,855	+ 17.2
All other fabric	756	720	+ 5.0
Fabric, n.s.k.	6,349	5,822	+ 9.1
Slacks, except dungarees & jeans, total	160,801	156,358	+ 2.8
By construction:			
Woven fabric	81,946	78,590	+ 4.3
Knit fabric	59,255	58,863	+ 0.7
Construction, n.s.k.	19,600	18,905	+ 3.7

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Categories of Women's, Misses' & Juniors' Sportswear by Fabric & Construction, 1979, 1980
(Thousands of Units)
(continued)

	1980	1979	% Change 1980/1979
Slacks, except dungarees & jeans (cont'd.)			
By fabric:			
All cotton & chiefly cotton	14,892	14,179	+ 5.0%
All man-made & chiefly man-made	112,072	108,103	+ 3.7
All wool & chiefly wool	6,592	6,436	+ 2.4
All other fabrics	4,989	2,689	+ 85.5
Fabrics, n.s.k.	22,256	24,951	- 10.8
Jeans & dungarees, total	70,406	66,489	+ 5.9
By fabric:			
All cotton & chiefly cotton	58,466	57,568	+ 1.6
All man-made & chiefly man-made	7,163	5,899	+ 21.4
Fabric, n.s.k.	4,777	3,022	+ 58.1
Swimwear, total	25,452	26,808	- 5.1
By construction:			
Woven fabric	3,708	4,464	- 16.9
Knit fabric	21,744	22,344	- 2.7
Construction, n.s.k.			
Shorts, exc. jogging & tennis, total	28,188	25,632	+ 10.0
By construction:			
Woven fabric	10,188	10,308	- 1.2
Knit fabric	16,236	14,424	+ 12.6
Construction, n.s.k.	1,764	900	+ 96.0
By fabric:			
All cotton & chiefly cotton	10,548	10,452	+ 0.9
All man-made & chiefly man-made	17,640	15,180	+ 16.2
All other fabrics			
Playsuits, beach tops, halters & other playwear, total	4,788	5,460	- 12.3
By construction:			
Woven fabric	1,476	1,404	+ 5.1
Knit fabric	2,400	2,748	- 12.7
Construction, n.s.k.	912	1,308	- 30.3
By fabric:			
All cotton & chiefly cotton	1,368	1,416	- 3.4
All man-made & chiefly man-made	1,704	2,124	- 19.8
All other fabrics	804	660	+ 21.8
Fabrics, n.s.k.	912	1,260	- 27.6

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(80)-1.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified women's, misses' & juniors' sportswear categories, as noted below.

Materials Consumed in the Production of Women's, Misses' & Juniors' Sportswear 1977, 1972

	Delivered Cost (Mil. $)		% Change
	1977	1972	1977/1972
Women's, misses' & juniors' blouses (SIC 2331*)			
Materials, containers & supplies	$743.0	$404.9	+ 83.5%
Broadwoven fabrics	256.1	111.7	+129.3
Purchased knitted fabrics	217.4	176.7	+ 23.0
All other materials, components & supplies, inc. n.s.k.	269.5	116.5	+131.3
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*)			
Materials, containers & supplies	1,187.9	568.9	+108.9
Broadwoven fabrics	495.2	201.4	+145.9
Purchased knitted fabrics	251.3	238.4	+ 5.4
All other materials, components & supplies, including those not specified by kind	441.4	128.8	+242.7
Knit outerwear mills, (SIC 2253*)			
Materials, containers & supplies	887.9	650.7	+ 36.5
Purchased knitted fabrics	90.4	16.4	+451.2
Carded cotton yarns	36.1	32.6	+ 10.7
Combed cotton yarns	29.7	43.8	- 32.1
Rayon & acetate spun yarns	1.7	6.2	- 72.6
Nylon spun yarns	8.7	19.2	- 54.7
Polyester spun yarns	34.0	74.5	- 54.4
Acrylic yarns	128.0	92.6	+ 38.2
Wool yarns	24.3	56.3	- 56.8
Rayon & acetate spun yarns	1.4	1.4	--
Nylon filament yarns	18.1	30.8	- 41.2
Polyester filament yarns	35.2	61.1	- 42.4
All other yarns	24.2	17.2	+ 40.7
All other materials, components & supplies including those not specified by kind	456.1	198.6	+129.7

n.s.k. = not specified by kind
* = for SIC definition see page 3.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-22B, MC77-1-23B.

PRODUCTION

By Price Line

Production of Blouses & Shirts by Wholesale Price, 1979, 1980
(Thousands of Units)

	1980	1979	% Change 1980/1979	% Distribution 1980
Blouses & shirts, exc. knit outerwear sport shirts, total	320,448	330,096	- 2.9%	100.0%
By price per dozen:				
Under $23.00	15,612	22,236	- 29.8	4.9
$23.00 - $38.99	28,536	17,364	+ 64.3	8.9
$39.00 - $59.99	72,900	75,816	- 3.8	22.7
$60.00 & over	169,116	168,924	+ 0.1	52.8
Price line, not reported	34,284	45,756	- 25.1	10.7

Source: U.S. Bureau of the Census
Current Industrial Reports,
Women's & Children's Outerwear, MA-23F(80)-1.

Seasonality of Production

The following table shows the 1981 distribution of production by months in specified types of women's sportswear and separates, as reported in the Census Bureau's monthly survey.

Monthly Cuttings of Selected Women's Sportswear, 1981
(% of Years Total)

	Skirts	Slacks*	Blouses	Sweaters**
Total	100.0%	100.0%	100.0%	100.0%
January	8.3	8.9	8.1	6.7
February	9.6	8.4	8.8	6.9
March	10.1	9.6	9.1	6.8
April	9.1	9.2	8.3	6.1
May	8.8	8.4	8.1	8.6
June	9.9	8.2	8.0	9.7
July	7.6	7.9	8.1	10.3
August	8.2	8.4	8.6	10.1
September	7.7	8.1	10.1	10.0
October	7.8	8.4	8.7	10.6
November	7.2	7.8	7.2	8.8
December	5.8	6.7	6.9	5.4

* = Includes jeans & dungarees
** = Based on shipments

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's, Misses' & Juniors' Apparel,
M23H(81)-12.

SHIPMENTS

Total U.S. shipments of women's, misses' and juniors' sportswear and separates increased 8.1% in value in 1980 compared to 1979, according to the Census Bureau's Current Industrial Reports survey. Shipments of shorts (excluding tennis and jogging) showed the sharpest gain in dollar value of shipments between 1979 and 1980, rising 32.2% during the period to over $75 million. Cardigan and coat-type sweaters' registered the biggest decline of the group, falling to $85.7 million in shipment value from $96.1 million in the preceding year. The only other categories registering declines during the period were pullover sweaters (-7.9%), vests (-8.1%) and playsuits (-0.4%).

Blouses and shirts accounted for the largest share of women's sportswear and separates shipment dollars, garnering nearly one out of every three dollars in the group. Slacks (except jeans and dungarees) was the second largest category, representing 29.3% of total shipments in 1980.

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear Categories, 1979, 1980

	Millions of Dollars		% Change
	1980	1979	1980/1979
All reported categories	$6,533.5	$6,043.7	+ 8.1%
Tops:			
Blouses & shirts, except knit outerwear sport shirts	1,980.1	1,924.3	+ 2.9
Knit outerwear sport shirts	592.3	550.0	+ 7.7
Sweaters	346.3	379.0	- 8.6
Pullovers	260.6	282.9	- 7.9
Cardigan & coat-type	85.7	96.1	- 10.8
Jackets	496.8	396.9	+ 25.2
Separate tailored suit-type	438.2	348.9	+ 25.6
Nontailored outer jackets, exc. ski jackets	58.6	48.0	+ 22.1
Vests, exc. sweater vests	15.9	17.3	- 8.1
Bottoms:			
Skirts	730.0	642.1	+ 13.7
Pants, total	1,912.3	1,712.2	+ 11.7
Slacks, exc. jeans & dungarees	1,321.9	1,214.9	+ 8.8
Jeans & dungarees	590.4	497.3	+ 18.7
Active Sportswear:			
Athletic shorts, exc. jogging shorts tennis shorts, tennis skirts, etc.	21.0	17.8	+ 18.0
Sweatshirts	30.4	25.9	+ 17.4
Swimsuits	244.5	242.7	+ 0.7
Skiwear, inc. jackets & pants, whether sold separately or as a unit	62.2	52.2	+ 19.2
Playgarments:			
Shorts, exc. tennis & jogging	75.9	57.4	+ 32.2
Playsuits, beach tops, halters, & other playwear	25.8	25.9	- 0.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear MA-23F(80)-1.

SHIPMENTS

By Leading States

New York was the leading state for shipments in nine of the eleven women's sportswear and separates categories measured by the Census Bureau in the 1977 Census of Manufactures. California was the leading state for shipments of bathing suits, Pennsylvania led in shirts and blouses, and North Carolina accounted for the largest share of knit outerwear sport shirts in 1977.

Value of Shipments by All Producers of Specified Women's Sportswear By Leading States, 1977

	Value of Shipments	
	Mil. $	% of total
Women's, misses' & juniors' knit outerwear sport shirts, U.S. total	$ 499.1	100.0%
Leading States:		
New York	139.1	27.9
California	130.8	26.2
Pennsylvania	60.1	12.0
North Carolina	34.6	6.9
New Jersey	31.4	6.3
Women's, misses' & juniors' blouses & shirts, U.S. total	1,421.7	100.0
Leading States:		
New York	556.5	39.1
California	254.6	17.9
Pennyslvania	151.8	10.7
Texas	81.5	5.7
New Jersey	62.7	4.4
Contract work on women's, misses' & juniors' blouses & shirts, U.S. total	487.7	100.0
Leading States:		
Pennsylvania	124.7	25.6
New York	61.7	12.7
California	50.2	10.3
Virginia	34.3	7.0
South Carolina	30.7	6.3
Women's, misses' & juniors' washable service apparel, U.S. total	193.2	100.0
Leading States:		
New York	53.3	27.6
California	22.8	11.8
Georgia	22.1	11.4
Missouri	20.0	10.4
Tennessee	12.5	6.5

(continued)

SHIPMENTS

By Leading States

Value of Shipments by All Producers of Specified Women's Sportswear By Leading States, 1977 (continued)

	Value of Shipments	
	Mil. $	% of Total
Women's, misses' & juniors' bathing suits, U.S. total	$ 163.8	100.0%
Leading States:		
California	72.3	44.1
New York	56.2	34.3
Pennsylvania	9.8	6.0
New Jersey	8.3	5.1
Women's, misses' & juniors' slacks, U.S. total	1,460.1	100.0
Leading States:		
New York	444.8	30.5
California	237.8	16.3
North Carolina	100.7	6.9
Massachusetts	100.0	6.8
Georgia	79.4	5.4
Women's, misses' & juniors' outerwear n.e.c., U.S. total	458.1	100.0
Leading States:		
New York	145.9	31.8
California	68.5	15.0
Ohio	34.4	7.5
North Carolina	29.3	6.4
New Jersey	22.3	4.9
Pennsylvania	22.3	4.9
Contract work on women's, misses' & juniors' outerwear, U.S. total	501.1	100.0
Leading States:		
New York	87.8	17.5
California	73.9	14.7
Pennsylvania	55.9	11.2
Virginia	31.0	6.2
Texas	30.9	6.2

(continued)

SHIPMENTS

By Leading States

Value of Shipments by All Producers of Specified Women's Sportswear
By Leading States, 1977
(continued)

	Value of Shipments	
	Mil. $	% of Total
Sweaters, knit jackets & jerseys, U.S. total	$555.5	100.0%
Leading States:		
New York	220.6	39.7
Pennsylvania	110.4	19.9
New Jersey	34.5	6.2
North Carolina	32.3	5.8
California	9.1	1.6
Knit outerwear sport shirts, U.S. total	518.1	100.0
Leading States:		
North Carolina	95.5	18.4
Pennsylvania	93.1	18.0
New York	49.1	9.5
Other knit outerwear products, U.S. total	689.7	100.0
Leading States:		
New York	132.2	19.2
North Carolina	81.6	11.8
Wisconsin	39.7	5.8
California	19.8	2.9
New Jersey	11.0	1.6

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series, MC77-1-23B, MC77-1-22B.

PRODUCER PRICE INDEXES

The largest jump in Producer (Factory) Price Indexes covering women's sportswear and separates between 1980 and 1981 was for sweaters, up 12.7% in the one year period. Prices for knit sportshirts rose 7.6% between 1980 and 1981 while the smallest increase of any category was in cut and sewn blouses where factory prices went up 3.4%. No measured category of women's sportswear and separates decreased between 1981 and the previous year in factory price levels.

As of June 1982, factory prices for all measured women's apparel averaged close to 4% above the 1981 annual average. Shirt prices were up 3.4%; blouses and shirts, 2.8%; sweaters, 6.2%.

PRODUCER PRICE INDEXES

Producer (Factory) Price Indexes for Selected Types of Women's Separates & Sportswear, 1978-1981

(1967 = 100, unless specified)

	June 1982	1981	1980	1979	1978	% Change 1981/1980	% Change 1980/1979
All apparel	193.0	186.0	172.4	160.4	152.4	+ 7.9%	+ 7.5%
Women's apparel, total	170.7	164.4	150.4	140.3	134.0	+ 9.3	+ 7.2
Skirts*	117.1	113.2	109.5	104.3	103.3	+ 3.4	+ 5.0
Cut-and-sewn blouses & shirts*	127.5	124.0	115.2	105.8	103.3	+ 7.6	+ 8.9
Knit sport shirts & tops*	na	na	115.0	97.1	100.7	na	+ 18.4
Sweaters	163.4	153.8	136.5	132.1	128.8	+ 12.7	+ 3.3

* 12/77 = 100
na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Bureau of Industrial Economics, imports represented 22.1% of the value of U.S. consumption of women's and misses' blouses and shirts in 1981.

The import/new supply ratio--the latter defined as the sum of product shipments plus imports--was reported by the Bureau as follows for 1981 compared with 1978: women's blouses and shirts, 0.113 versus 0.097; women's outerwear, 0.124 versus 0.085. (In other words, imports of outerwear represented 12.4% of new supply in 1981 compared with 8.5% in 1978.)

The U.S. reported $2.7 billion worth of all types of women's and children's sportswear and separates in 1981 as opposed to $2.2 billion in the previous year for a gain of 20.8%. Both these figures are C.I.F. values (see footnotes on the following table), as recorded by the Census Bureau. On a quantity measurement, imports of sportswear and separates were almost 54 million dozen. This represents an increase of 12.1% over the 48,181 thousand dozen imported the year before.

Imports of skirts of all types showed the largest percentage increase between 1980 and 1981 rising 46.0% in unit terms and 41.3% in dollar terms. The only category registering a decline in imports in 1981 was sweaters, falling 3.1% in units, although they did manage to show an increase in dollar value during the year (up 5.0%).

FOREIGN TRADE

Imports

Summary of U.S. Imports of Women's & Children's Sportswear, 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Total, all reported categories	53,999.5	48,181.3	+ 12.1%	$2,677,506	$2,217,339	+ 20.8%
Blouses & shirts, total	28,004.3	25,487.6	+ 9.9	1,122,460	922,292	+ 21.7
Blouses	13,125.8	11,283.8	+ 16.3	722,081	534,085	+ 35.2
Not knit	12,463.0	10,741.2	+ 16.0	667,934	498,219	+ 34.1
Cotton	6,858.1	6,003.5	+ 14.2	294,275	236,652	+ 24.3
Wool or man-made	5,158.2	4,430.4	+ 16.4	289,066	207,247	+ 39.5
Silk	446.7	307.3	+ 45.4	84,593	54,320	+ 55.7
Knit, wool	662.8	542.8	+ 22.1	54,147	35,866	+ 51.0
Shirts, knit						
Cotton or man-made	14,878.5	14,203.8	+ 4.8	400,379	388,207	+ 3.1
Sweaters, knit	9,938.4	10,273.7	- 3.3	649,447	618,409	+ 5.0
Cashmere, wholly or part	47.1	41.2	+ 14.3	19,234	13,653	+ 40.9
Sheep-like hair	387.4	347.9	+ 11.4	46,206	33,225	+ 39.1
Wool	1,236.4	1,667.3	- 25.8	122,161	143,886	- 15.1
Man-made	7,920.2	7,833.2	+ 1.1	429,992	397,225	+ 8.2
Cotton	347.3	384.1	- 9.6	31,854	30,420	+ 4.7
Pants, slacks & shorts	12,881.3	10,281.9	+ 25.3	743,576	565,071	+ 31.6
Not knit						
Cotton	8,703.7	7,715.3	+ 12.8	546,252	449,281	+ 21.6
Wool	106.0	74.6	+ 42.1	20,879	14,908	+ 40.1
Man-made	3,982.5	2,437.5	+ 63.3	161,709	91,992	+ 75.8
Silk	89.1	54.5	+ 63.5	14,736	8,890	+ 65.8
Skirts	1,810.7	1,240.4	+ 46.0	122,723	86,826	+ 41.3
Not knit	1,564.9	1,024.1	+ 52.8	103,717	68,719	+ 50.9
Wool	84.0	71.7	+ 17.2	18,788	16,183	+ 16.1
Man-made	314.2	151.8	+107.0	22,088	10,514	+110.1
Cotton	1,166.7	800.6	+ 45.7	62,841	42,022	+ 49.5
Knit	245.8	216.3	+ 13.6	19,006	18,107	+ 5.0
Wool	23.2	36.2	- 35.9	3,759	5,872	- 36.0
Cotton or man-made	222.6	180.1	+ 23.6	15,247	12,235	+ 24.6
Playsuits						
Not knit						
Cotton	1,364.8	897.7	+ 52.0	39,300	24,741	+ 58.8

* = The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135, December 1980, 1981.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Blouses, cotton, not knit total	6,858.1	6,003.5	+ 14.2%	$294,275	$236,652	+ 24.3%
Hong Kong	2,756.2	1,873.5	+ 47.1	126,447	83,264	+ 51.9
India	2,357.3	2,234.0	+ 5.5	96,483	85,674	+ 12.6
Taiwan	374.5	410.0	- 8.7	17,135	15,957	+ 7.4
Blouses, wool or man-made not knit, total	5,158.2	4,430.4	+ 16.4	289,066	207,247	+ 39.5
Korea	1,176.5	988.6	+ 19.0	52,354	36,556	+ 43.2
Taiwan	701.3	745.3	- 5.9	51,104	38,870	+ 31.5
Hong Kong	686.1	744.9	- 7.9	59,958	52,957	+ 13.2
Blouses, silk, not knit total	446.7	307.3	+ 45.4	84,593	54,320	+ 55.7
Hong Kong	316.4	210.8	+ 50.1	53,365	31,404	+ 69.9
Korea	71.5	47.2	+ 51.5	15,116	8,623	+ 75.3
Mainland China	21.6	6.6	+227.3	2,725	858	+217.6
Blouses, wool, knit, total	662.8	542.8	+ 22.1	54,147	35,866	+ 51.0
Hong Kong	630.7	523.1	+ 20.6	51,049	34,145	+ 49.5
Korea	13.5	9.4	+ 43.6	1,062	528	+101.1
Mainland China	9.0	3.2	+181.3	539	174	+209.8
Shirts, cotton or man-made knit, total	14,878.5	14,203.8	+ 4.8	400,379	388,207	+ 3.1
Taiwan	3,419.3	4,053.3	- 15.6	107,289	123,167	- 12.9
Hong Kong	2,976.7	2,619.0	+ 13.7	85,741	80,645	+ 6.3
Korea	2,543.8	1,652.3	+ 54.0	65,617	41,919	+ 56.5
Sweaters, cashmere, knit, total	47.1	41.2	+ 14.3	19,234	13,653	+ 40.9
Hong Kong	30.5	23.7	+ 28.7	10,452	6,552	+ 59.5
United Kingdom	6.5	7.3	- 11.0	4,592	3,953	+ 16.2
Italy	5.2	3.7	+ 40.5	2,340	1,295	+ 80.7
Sweaters, sheep-like hair, knit, total	387.4	347.9	+ 11.4	46,206	33,225	+ 39.1
Hong Kong	290.9	218.6	+ 33.1	34,454	20,440	+ 68.6
Mainland China	22.7	66.1	- 65.7	2,161	5,513	- 60.8
Macao	17.9	14.5	+ 23.4	2,066	1,552	+ 33.1

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981

(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Sweaters, wool, knit, total	1,236.4	1,667.3	- 25.8%	$122,161	$143,886	- 15.1%
Hong Kong	615.6	840.1	- 26.7	63,885	73,115	- 12.6
Mainland China	210.6	399.4	- 47.3	13,063	28,115	- 53.5
Maurit	86.0	22.9	+275.5	5,006	1,320	+279.2
Sweaters, man-made, knit, total	7,920.2	7,833.2	+ 1.1	429,992	397,225	+ 8.2
Taiwan	3,278.7	3,800.8	- 13.7	202,087	203,995	- 0.9
Korea	2,657.5	2,462.4	+ 7.9	137,801	116,331	+ 18.5
Hong Kong	1,012.0	779.8	+ 29.8	56,475	52,333	+ 7.9
Sweaters, cotton, knit, total	347.3	384.1	- 9.6	31,854	30,420	+ 4.7
Hong Kong	199.5	252.2	- 20.9	19,155	19,891	- 3.7
Korea	34.1	30.6	+ 11.4	2,510	2,020	+ 24.2
Taiwan	32.9	23.3	+ 41.2	2,556	1,604	+ 59.4
Pants, slacks & shorts, cotton, not knit, total	8,703.7	7,715.3	+ 12.8	546,252	449,281	+ 21.6
Hong Kong	3,371.1	3,815.0	- 11.6	255,975	261,803	- 2.2
Japan	1,194.6	624.6	+ 91.3	62,081	29,642	+109.4
Mainland China	1,020.0	899.0	+ 13.5	43,312	26,341	+ 64.4
Pants, slacks & shorts, wool, not knit, total	106.0	74.6	+ 42.1	20,879	14,908	+ 40.1
Hong Kong	25.6	24.6	+ 4.1	4,608	4,102	+ 12.3
Japan	21.8	15.6	+ 39.7	2,851	1,800	+ 58.4
Taiwan	7.0	6.4	+ 9.4	751	764	- 1.7
Pants, slacks & shorts, man-made, not knit, total	3,982.5	2,437.5	+ 63.3	161,709	91,992	+ 75.8
Taiwan	2,162.4	1,368.7	+ 58.0	91,603	48,142	+ 90.3
Mainland China	464.8	36.9	+1,159.6	11,391	688	+1,555.7
Mexico	448.9	451.5	- 0.6	21,098	19,201	+ 9.9
Pants, slacks & shorts, silk, not knit, total	89.1	54.5	+ 63.5	14,736	8,890	+ 65.8
Hong Kong	80.2	45.3	+ 77.0	12,384	7,045	+ 75.8
Korea	4.3	2.6	+ 65.4	1,050	578	+ 81.7
Mainland China	2.0	0.6	+233.3	227	70	+224.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear by Leading Country of Origin 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Shirts, cotton, total	1,166.7	800.6	+ 45.7%	$62,841	$42,022	+ 49.5%
Hong Kong	365.6	273.9	+ 33.5	22,333	14,346	+ 55.7
India	289.5	215.3	+ 34.5	15,974	10,870	+ 47.0
Pakistan	201.2	61.6	+226.6	4,514	1,578	+186.1
Shirts, man-made, not knit, total	314.2	151.8	+107.0	22,088	10,514	+110.1
Taiwan	119.2	60.8	+ 96.1	6,792	3,164	+114.7
Hong Kong	52.7	24.7	+113.4	5,784	2,341	+147.1
Philippines	32.3	15.1	+113.9	1,110	502	+121.1
Shirts, wool, not knit, total	84.0	71.7	+ 17.2	18,788	16,183	+ 16.1
Hong Kong	21.2	9.5	+123.2	4,022	1,706	+135.8
Japan	13.7	21.2	- 35.4	1,516	2,012	- 24.7
United Kingdom	7.6	9.0	- 15.6	2,584	2,915	+ 11.4
Shirts, wool, knit, total	23.2	36.2	- 35.9	3,759	5,872	- 36.0
Hong Kong	16.9	26.2	- 35.5	1,906	2,609	- 26.9
Fr. Germany	1.7	4.1	- 58.5	532	1,317	- 59.6
Italy	1.3	2.2	- 40.9	528	1,055	- 50.0
Shirts, cotton or man-made knit, total	222.6	180.1	+ 23.6	15,247	12,235	+ 24.6
Hong Kong	87.2	74.4	+ 17.2	6,132	5,614	+ 9.2
Taiwan	86.8	52.1	+ 66.6	5,154	2,429	+112.2
Philippines	8.3	4.3	+ 93.0	658	316	+108.2
Playsuits, cotton, not knit, total	1,364.8	897.7	+ 52.0	39,300	25,741	+ 52.7
Mainland China	542.2	224.3	+141.7	13,023	5,002	+160.4
Hong Kong	356.7	382.9	- 6.8	12,087	12,402	- 2.5
Philippines	191.8	108.0	+ 77.6	5,083	2,112	+140.7

* = The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of origin and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135, December 1980, 1981

FOREIGN TRADE

Exports

In 1981, exports of women's and children's sportswear and separates fell nearly 7% in unit terms even though in dollar terms the category increased by 7.3%.

Both the trouser and sweater categories registered a decline in dollars and units in 1981, while skirt exports, as well as blouses and shirts, registered gains in the period. The biggest gainer in 1981 was man-made blouses and shirts which registered a 2[illegible].5% gain in dollars and a 264.4% increase in units.

Trousers, slacks and shorts and blouses and shirts combined accounted for over 95% of all women's and children's sportswear exports in 1981, with each category representing well over 47% of the total.

Summary of Exports of Women's & Children's Sportswear, 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Total, all reported categories	3,517.3	3,777.2	- 6.9%	$86,509	$80,653	+ 7.3%
Trousers, slacks & shorts, total	1,668.3	2,196.6	- 24.0	36,928	40,928	- 9.8
Not knit	548.1	460.2	+ 19.1	19,339	16,930	+ 14.2
Cotton	278.1	224.0	+ 24.2	8,852	9,337	- 5.2
Wool	8.5	3.9	+117.9	726	233	+211.6
Man-made	242.4	222.0	+ 9.2	8,926	6,804	+ 31.2
Other	19.1	10.3	+ 85.4	835	556	+ 50.2
Knit	1,120.2	1,736.4	- 35.5	17,589	23,998	- 26.7
Cotton	163.1	139.2	+ 17.2	3,371	3,313	+ 1.8
Wool	586.0	1,334.4	- 56.1	4,310	10,816	- 60.1
Man-made	78.8	110.0	- 28.4	2,383	3,344	- 28.7
Other	292.3	251.8	+ 16.1	7,525	7,155	+ 5.2
Skirts, total	122.4	110.0	+ 11.2	5,589	4,178	+ 33.8
Not knit	65.4	38.5	+ 69.9	3,434	2,069	+ 66.0
Wool	5.5	2.9	+ 89.7	385	132	+191.7
Cotton	29.3	18.5	+ 58.4	1,309	900	+ 45.4
Man-made	28.3	15.8	+ 79.1	1,528	904	+ 69.0
Other	2.3	1.4	+ 64.3	212	133	+ 59.4
Knit	57.0	71.4	- 20.2	2,155	2,109	+ 2.2
Wool	2.1	1.1	+ 90.9	204	91	+124.2
Cotton	17.9	28.5	- 37.2	655	639	+ 2.5
Man-made	31.3	36.1	- 13.3	966	1,014	- 4.7
Other	5.7	5.7	--	330	365	- 9.6

(continued)

FOREIGN TRADE

Exports

Summary of Exports of Women's & Children's Sportswear, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Blouses & shirts, total	1,682.6	1,419.8	+ 18.5%	$41,848	$33,321	+ 25.6%
Knit	615.3	523.1	+ 17.6	17,876	12,913	+ 38.4
Cotton	174.7	202.9	- 13.9	5,030	5,824	- 13.6
Wool	17.7	147.6	- 88.0	759	1,910	- 60.3
Man-made	400.8	110.0	+264.4	11,286	3,344	+237.5
Other	22.1	62.6	- 64.7	801	1,835	- 56.3
Not knit	1,067.3	896.7	+ 19.0	23,972	20,408	+ 17.5
Cotton	161.7	111.9	+ 44.5	4,777	3,823	+ 25.0
Wool	21.5	10.6	+102.8	731	387	+ 88.9
Man-made	387.0	538.6	- 28.1	10,432	11,649	- 10.4
Other	497.1	235.6	+111.0	7,852	4,549	+ 72.6
Sweaters, total	44.0	50.8	- 13.4	2,144	2,226	- 3.7
Knit						
Wool	8.0	6.6	+ 21.2	542	400	+ 35.5
Cotton	13.9	18.7	- 25.7	475	787	- 39.6
Man-made	22.1	25.5	- 13.3	1,127	1,039	+ 8.5

* = The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of exportation, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410, December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The sportswear industry is now benefiting from the "baby boom" years, when U.S. fertility rates were at peak levels in the years 1947 to 1964. There are now close to 74 million aged 18 to 35 years in the population, of which 36.6 million are females. This group represents almost a third of the U.S. population and encompasses an age where interest in sports and active wear, plus ability to spend in this area, is at a peak.

In the years ahead, the baby boomers will account for a rapid growth in the population of those 35 to 54 years of age.

THE POTENTIAL MARKET

Female Population of the U.S., 1981 & Projections to 2000*
(In Millions)

	1981	1990*	2000*	Percent of Female Population 1981	 1990*	 2000*
Total, all ages	117.9	125.0	133.8	100.0%	100.0%	100.0%
Under 15 years	25.0	26.9	27.8	21.2	21.5	20.8
15 years & older	92.9	98.1	106.0	78.8	78.5	79.2
15-19 years	10.0	8.2	9.7	8.5	6.6	7.2
20-24 years	10.8	8.9	8.3	9.2	7.1	6.3
25-34 years	19.6	20.7	17.3	16.6	16.6	12.9
35-44 years	13.5	18.6	21.1	11.5	14.9	15.8
45-54 years	11.6	13.0	18.4	9.8	10.4	13.8
55-64 years	11.7	10.8	12.1	9.9	8.6	9.0
65 & over	15.7	17.8	19.1	13.3	14.2	14.3
Median age	31.6	32.7	36.8			

* = These are Series II projections, which assume a fertility rate of 2.1 or at the replacement level. These projections, compiled in 1977, are subject to revision based on the results of the 1980 Census of Population.

Source: U.S. Bureau of the Census,
Current Population Reports P-25, Nos. 704, 914.

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 14 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 47 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Estimated Number of Women 18 Years of Age & Over By Height & Weight, 1982
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	86,063	100.0%	19,537	22.7%	38,251	44.4%	28,251	32.9%
Height:								
5'3" or less	46,991	54.6	14,114	16.4	19,622	22.8	13,254	15.4
5'4" - 5'6"	31,068	36.1	4,992	5.8	14,630	17.0	11,446	13.3
5'7" or more	8,004	9.3	430	0.5	3,959	4.6	3,615	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1982 by age.

RETAIL SALES

Active Sportswear

The National Sporting Goods Association issues an annual report on projected U.S. retail sales of sports apparel and equipment based on purchases made by a panel of 80,000 households nationwide. Projected sales in the table below include active sportswear sales for both women and men, as the NSGA did not separate the data by sex.

For 1981 and 1982, projected sales are for the October through September period.

Estimated Retail Sales of Active Sportswear 1981 & Projected Retail Sales for 1982
(Millions of Dollars)

	Estimated 1981	Projected 1982	Average Price
Athletic socks	$276.6	$281.0	$ 1.74
Bathing suits	860.0	946.0	19.89
Golf clothing	198.0	208.0	na
Down or fiber-filled parkas	351.7	376.0	62.10
Elastic waist shorts	334.0	367.0	7.77
Skiwear	257.7	271.0	na
Sweatshirts	191.5	211.0	10.22
Tennis clothing	150.1	158.0	na
Down or fiber-filled vests	238.0	243.0	32.78
Warm-up suits	352.2	380.0	26.99

Source: National Sporting Goods Association, Sporting Goods Market in 1982.

Jeans

Total jeans sales (both men's and women's) increased by 3% in 1981 to 525 million units according to Jeanswear Communications, a promotional organization for the jeans industry. Sales of women's jeans increased by 16% on a unit basis during 1981 while girls sales were up by 11% in that same year. Jeanswear Communications also reports that denim accounted for 81% of sales while corduroy represented 12% and all other fabrics accounted for the remainder.

Over the last few years it has become apparent that the jeans market is a "mature" one in which many manufacturers are diversifying into other apparel areas, particularly sportswear, in order to maintain their sales and profit levels. This is especially true in the designer segment of the market where 1982 is being characterized by declining dollar volume and deep discounting by retailers in order to maintain their sales base. The main causes cited for the decline in jeans sales are the over saturation of the market, an aging population, consumer resistance to higher price points and a swing to more dramatic fashion pants.

RETAIL SALES

Jeans

Retailers expect that for the remainder of 1982 the basic jeans business will remain highly promotional resulting in increased unit sales but decreased dollar volume. Many industry analysts, however, do see possible promise for a revival of the industry from sales of newer items such as stone washed jeans, black denims and fashion pants.

RETAIL SALES BY STORE TYPE

The only official information on sales of women's sportswear and separates in specified types of retail outlets is reported in the 1977 Census of Retail Trade. Only stores with payrolls are included in merchandise line reports and not all stores are required to break down their sales by merchandise category.

Sportswear, Separates & Coordinates

During 1977, women's ready-to-wear stores took the major share of reported sales of women's sportswear, separates and coordinates, accounting for 44.0% of sales while representing 54.2% of all stores reporting sales in the category. Department stores, while only having 13.0% of the stores reporting sales of women's sportswear, garnered the second largest share of sales with 41.0% of the $10.5 billion market in that year.

Reported Sales of Women's Sportswear Separates & Coordinates by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Sportswear, separates & coordinates	62,875	100.0%	$10,476.6	100.0%
Department stores*	8,177	13.0	4,313.4	41.2
Women's ready-to-wear stores**	34,109	54.2	4,605.4	44.0
Family clothing stores	13,674	21.7	1,102.0	10.5
Men's wear stores	2,619	4.2	119.2	1.1
Shoe stores	353	0.6	10.4	0.1
Children's wear stores	273	0.4	7.4	0.1
Mail order houses	3,670	5.8	318.8	3.0

*Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of specialized women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC77-L.

RETAIL SALES BY STORE TYPE

Women's Active Sportswear

The latest official data on types of women's active sportswear sales comes from the 1977 Census of Retail Trade, among the stores which separately reported on this category, total sales came to about $2.2 billion. Department stores held the lion's share of the reported total, 54%, while accounting for only 18% of the total number of stores reporting sales in the category. Sporting goods stores accounted for only 5.6% of women's active sportswear sales in 1977, but have increased their share in recent years as greater emphasis has been placed on soft goods and fashion activewear in these outlets.

Women's active sportswear accounted for 4.4% of total store sales in women's ready-to-wear stores while it was responsible for 3.6% in family clothing stores and 1.5% in department stores in 1977 according to the U.S. Bureau of the Census.

Reported Sales of Women's Active Sportswear by Store Type, 1977
(Includes only stores with Payrolls)

	Stores Reporting Sales		Sales	
	Number	% of total	Mil. $	% of total
Women's active sportswear*	40,892	100.0%	$2,167.8	100.0%
Department stores**	7,275	17.8	1,178.2	54.4
Women's ready-to-wear stores	17,798	43.5	545.1	25.1
Family clothing stores	8,466	20.7	280.3	12.9
Sporting goods stores, general line***	1,816	4.4	78.2	3.6
Sporting goods stores, specialty line***	1,156	2.8	43.5	2.0
Mail order houses	3,595	8.8	31.7	1.5
Other (men's wear, children's wear stores)	786	2.0	10.8	0.5

*Total is based only on stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major category types of outlets handling each category.

**See footnote below.

***Reported as sales of women's and girls' clothing, except footwear.

RETAIL SALES BY STORE TYPE

Women's Active Sportswear

Percent of Total Sales Accounted for by Women's Active Sportswear Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Accounted for by Women's Active Sportswear
Department stores**	$ 76,909.4	1.5%
Women's ready-to-wear stores	12,250.3	4.4
Family clothing stores	7,883.6	3.6

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations which are included in mail order house data.

Source for the preceding two tables:
U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Department Stores

The number of firms operating department stores declined to 600 in 1977 according to the Census of Retail Trade, published by the U.S. Bureau of the Census, from a total of 866 counted in the 1972 census. This decline represented a drop of 30.7% for the period. The number of stores operated by these firms increased 13.7% from 7,742 department stores counted in 1972 to 8,807 in 1977. By 1979, the census bureau estimated that there were 9,013 department stores in business with sales of $90 billion. In 1981, department store sales surpassed the $100 billion mark attaining a peak of $103.6 billion in that year. Preliminary data from the Census Bureau indicates that over the first six months of 1982, department store sales had risen 10.4% over sales for the same period in 1981.

The department business has become more concentrated among large firms. In 1977, the 50 largest department store operators controlled 86.5% of all department store sales as compared to 82.1% in 1972 according to the U.S. Bureau of the Census.

Department Stores: Number of Stores & Total Sales 1978-1981

	1981	1980	1979	1978	% Change 1981/1980	% Change 1980/1979
Number of Stores	na	na	9,013	8,546	na	na
Total Sales (Mil. $)	$103,609	$94,705	$90,006	$84,496	+ 9.4%	+ 5.2%

na = not available

Source: U.S. Bureau of the Census
Revised Monthly Retail Sales & Inventories,
County Business Patterns, 1978, 1979.

RETAIL SALES BY STORE TYPE

Department Stores

Department Stores by Employee Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores, total	9,013	100.0%	1,608,156	100.0%	$11,531.6	100.0%
By establishment size:						
Under 50 employees	1,266	14.0	48,857	3.0	325.7	2.8
50-99 employees	2,276	25.3	164,020	10.2	1,071.1	9.3
100-249 employees	3,706	41.1	581,698	36.2	3,796.8	32.9
250-999 employees	1,694	18.8	684,354	42.6	5,049.8	43.8
1,000 or more employees	71	0.8	129,227	8.0	1,288.2	11.2

Source: U.S. Bureau of the Census,
County Business Patterns, 1979

Women's sportswear and separate departmental operating results are compiled annually by the National Retail Merchants Association. Findings for 1980 are summarized on the next page.

Department Stores (continued)

Selected Typical (Median) 1981 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store	All Adult Female Apparel	All Adult Female Sportswear	Junior Spectator Sportswear	Junior Active Sportswear	Women's & Misses' Spectator Sportswear	Women's & Misses' Active Sportswear	All Adult Female Jackets & All-Weather Coats
Net sales, % change from last year	+ 6.7%	+ 8.8%	+ 13.1%	+ 3.2%	+ 34.9%	+ 13.5%	+ 25.6%	+ 3.7%
Sales, % of merchandise division	--	100.0	32.4	14.3	1.2	44.2	4.0	1.4
Sales, % to total store sales	90.1	24.5	13.1	3.0	0.3	9.3	0.9	0.6
$ sales per sq. ft. of selling space	$111.8	$129.2	$142.4	$173.7	--	$139.9	$179.4	$163.0
Cumulative mark-on, %	48.2%	50.8%	51.1%	51.8%	51.8%	51.4%	50.8%	50.0%
Gross margin, % of sales incl. cash discounts	42.0	43.0	44.4	46.0	49.4	44.6	48.4	43.3
Markdowns, retail, % of sales	13.0	20.9	19.1	19.2	13.3	20.4	12.1	18.4
Returns, % of sales	8.3	11.2	10.7	11.6	6.7	13.2	8.9	11.4
Sales promotions, % of sales	3.2	2.9	2.7	3.7	3.3	3.0	2.6	4.0
Salespeople's salaries, % of sales	7.5	6.8	6.6	4.8	--	6.2	6.6	6.5
Number of stock turns	2.7	3.8	4.0	4.6	4.6	3.9	4.0	3.6

Source: National Retail Merchants Association, "Merchandising & Operating Results," 1982 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Large firms, with annual sales of $1 million and over, operated 27.3% of all women's ready-to-wear stores in 1977. These outlets had combined sales of $8.0 billion or 64.6% of total sales of this store type ($12.4 billion). By 1981, sales of women's ready-to-wear stores had risen to $16.5 billion an increase of nearly one-third from their 1977 level. County Business Patterns reports that in 1979 there were 36,606 women's ready-to-wear stores in operation, down 7.9% from 1978's total of 39,765.

Women's Ready-To-Wear Stores: Number of Stores & Total Sales 1978-1981

					% Change	
	1981	1980	1979	1978	1981/1980	1980/1979
Number of Stores	na	na	36,606	39,765	na	na
Total Sales (Mil. $)	$16,532	$15,074	$14,969	$14,297	+ 9.7%	+ 0.7%

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales & Inventories,
County Business Patterns, 1978, 1979.

Women's Ready-To-Wear Stores by Employee Size, 1979

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Women's ready-to-wear stores, total	39,606	100.0%	357,341	100.0%	$2,705.0	100.0%
By establishment size:						
Under 10 employees	28,704	72.5	122,438	34.3	706.1	34.0
10-19 employees	7,763	19.6	105,658	29.6	571.0	27.5
20-49 employees	2,573	6.5	74,567	20.8	410.2	19.8
50-99 employees	436	1.1	29,765	8.3	186.0	9.0
100 or more employees	130	0.3	24,913	7.0	201.7	9.7

Source: U.S. Bureau of the Census,
Country Business Patterns, 1979

Sales of Women's Ready-To-Wear Stores by Month, 1980, 1981

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1981	100.0%	6.7	6.1	7.4	8.4	8.0	7.6	7.8	8.6	8.5	8.9	8.8	13.2
1980	100.0%	6.7	6.2	7.6	7.9	8.0	7.2	7.5	8.6	8.3	9.1	9.3	13.6

Source: U.S. Bureau of the Census,
Revised Monthly Sales & Inventories.

In 1980, sales of adult female sportswear in women's specialty stores increased 9.1% according to the National Retail Merchants Association.

RETAIL SALES BY STORE TYPE

Specialty Stores

Selected Typical (Median) 1981 Merchandising & Operating Results In Specialty Stores with Total Annual Sales over $1 Million

	Women's & Misses' Sportswear	Women's & Misses' Spectator Sportswear	Women's & Misses' Active Sportswear	Juniors' Sportswear	Juniors' Spectator Sportswear	Juniors' Active Sportswear
Net sales, % change from last year	+ 8.9%	+ 15.0%	+ 12.8%	+ 17.1%	+ 17.2%	--
Sales, % of merchandise division	44.4	36.2	3.0	22.9	15.4	4.3%
Sales, % to total store sales	21.4	15.6	1.2	12.2	7.6	2.2
$ sales per sq. ft. of selling space	$175.5	$261.0	$196.4	$151.9	--	--
Cumulative mark-on, %	51.7%	51.2%	51.2%	51.3%	51.3%	50.3%
Gross margin, % of sales incl. cash discounts	43.8	42.6	47.0	43.2	42.4	43.4
Markdowns, retail, % of sales	20.6	18.9	13.5	17.9	21.7	20.3
Returns, % of sales	11.7	--	--	7.8	--	--
Sales promotions, % of sales	2.3	--	--	2.2	--	--
Salespeople's salaries, % of sales	7.6	--	--	7.6	--	--
Number of stock turns	3.8	3.7	4.1	4.4	5.1	3.9

Source: National Retail Merchants Association,
"Merchandising & Operating Results,"
1982 Edition.

Seasonal Pattern

A five-year average (1961-1965) in department store sportswear department sales shows the following monthly pattern:

Percent of Years' Total Sales by Month In Blouse, Skirt & Sportswear Departments

Month	Percent	Month	Percent
January	5.1%	July	7.7%
February	5.0	August	8.0
March	6.6	September	8.6
April	7.6	October	8.8
May	8.8	November	9.2
June	8.7	December	15.9

Source: Newspaper Advertising Bureau,
Sales Planning Guide.

RETAIL ADVERTISING BY MONTH

Percent of Year's Total Newspaper Linage by Retailers Used Each Month, 1981

	Coats & Jackets	Pants & Shorts	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts
January	7.2%	5.5%	4.7%	4.8%	4.6%
February	7.0	8.2	5.4	4.5	8.0
March	7.2	10.6	5.4	15.4	10.2
April	5.9	9.8	6.5	7.1	10.9
May	2.9	9.9	7.7	20.4	9.6
June	2.6	7.4	6.9	22.5	5.2
July	3.8	6.7	4.8	13.4	5.8
August	9.1	9.4	9.6	4.8	8.5
September	12.8	8.3	9.5	0.4	8.9
October	15.4	7.8	11.0	0.0	8.4
November	14.9	9.0	13.8	4.3	9.9
December	11.2	7.4	14.7	2.4	10.0

Source: The Advertising Checking Bureau, Inc., Neustadt Reports Division, covering all retail newspaper advertising linage in all newspapers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles and Washington. (1983 Newspaper Planbook).

CONSUMER PRICES

There has been a slight downward trend in retail prices covering separates and sportswear in recent months, while overall consumer price levels in women's apparel showed a gain.

Consumer Price Index
(1977=100)

	April 1982	April 1981	% Change 1982/1981	Annual Average 1981	Annual Average 1980	% Change 1981/1980
Apparel commodities less footwear*	177.4	174.0	+ 2.0%	174.0	167.8	+ 3.7%
Women's apparel	107.1	105.0	+ 2.0	104.3	103.1	+ 1.2
Coats & jackets *	163.4	157.6	+ 3.7	159.1	164.2	- 3.1
Separates & sportswear	100.1	100.2	- 0.1	99.0	99.8	- 0.8

* Base: 1967 = 100

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Data on the purchases of specific types of women's sportswear, as shown below, have been compiled by the NPD Textile and Apparel Market Index, a specialized service of NPD Research Inc., Floral Park, New York. This data is based on the findings of an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families. (The data for women includes family members 17 years old and older.)

Place of Purchase

In each of the women's sportswear and separates categories covered, with the exception of jackets, specialty stores accounted for the largest share of reported dollar volume of purchases in 1981, with department stores ranking second. For jackets the order is reversed with department stores holding the number one spot and specialty stores second.

Percent of Women's Sportswear Purchases by Type of Outlet, 1981
(Based on Dollar Volume)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts	Jackets
Specialty stores	30.8%	28.7%	33.1%	32.9%	28.9%	31.0%
Department stores	29.8	23.7	29.4	30.3	25.3	36.9
Major chains*	14.4	14.3	14.5	15.2	16.6	12.0
Discount stores	17.0	19.3	14.4	14.2	19.7	11.9
Variety stores	1.8	2.7	0.9	1.2	2.0	0.9
Mail order	1.5	1.6	1.7	1.8	1.4	1.3
All others	4.7	9.7	6.0	4.4	6.1	6.0

* = Includes Sears, Penney, Ward, etc.

Source: NPD Research, Inc.

Seasonality

The majority of shorts and tops are purchased during the spring and summer seasons, according to NPD data. Sweaters, blazers and jackets are bought prior to the onset of winter, primarily during October, November and December.

Percent of Women's Sportswear Purchases by Month, 1981
(Based on Dollar Volume)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts/ Tennis Dresses	Jackets
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	6.7	3.0	9.8	7.7	1.6	9.6
February	5.2	4.0	6.0	5.5	2.2	5.2
March	7.2	8.4	3.7	7.5	4.2	7.0
April	9.3	11.5	2.7	9.6	13.2	7.8

(continued)

CONSUMER BUYING HABITS

Seasonality

Percent of Women's Sportswear Purchases by Month, 1981
(Based on Dollar Volume)
(continued)

	Shirts & Blouses	Other Tops	Sweaters	Slacks & Pants	Shorts/ Tennis Dresses	Jackets
May	8.6%	16.4%	2.2%	7.7%	19.6%	5.5%
June	8.0	19.9	1.3	7.1	29.3	2.5
July	8.9	14.8	3.0	7.9	18.2	5.8
August	8.0	8.5	6.8	9.3	5.0	7.1
September	8.1	4.2	9.5	9.2	3.4	11.0
October	9.8	2.4	12.5	10.0	1.6	12.9
November	9.0	3.2	16.4	7.8	.4	11.5
December	11.2	3.7	26.1	10.7	1.3	14.1

By Price Line

Percent of Women's Sportswear Purchases by Price Point, 1981

	Shorts/Tennis Dresses		
	Units	Dollars	Average Price
Under $3.00	23.3%	8.4%	$ 2.25
$3.00 - $6.99	45.7	34.9	4.77
$7.00 & over	31.0	56.7	11.44

	Shirts & Blouses		
	Units	Dollars	Average Price
Under $4.00	10.3%	2.4%	$ 2.62
$4.00 - $7.99	29.0	15.9	6.17
$8.00 - $11.99	26.5	23.3	9.90
$12.00 & over	34.2	58.4	19.23

	Sweaters			Slacks & Pants	
	Units	Dollars	Average Price	Units	Dollars
Under $10.00	40.0%	19.8%	$ 6.71	43.2%	21.3%
$10.00 - $19.99	45.2	47.4	14.22	42.4	46.5
$20.00 & over	14.8	32.8	30.04	14.4	32.2

(continued)

CONSUMER BUYING HABITS

By Price Line

Percent of Women's Sportswear Purchases by Price Point, 1981
(continued)

	Jackets		
	Units	Dollars	Average Price
Under $20.00	34.3%	14.4%	$ 13.64
$20.00 - $49.99	50.5	49.6	31.92
$50.00 & over	15.2	36.0	76.70

	Other Tops		
	Units	Dollars	Average Price
Under $3.00	22.5%	7.2%	$ 2.01
$3.00 - $4.99	26.3	16.8	4.01
$5.00 - $7.99	26.9	27.4	6.39
$8.00 & over	24.3	48.6	12.55

Source: NPD Research Inc.

Jeans

A profile of women's jeans purchases in 1981 indicated that department stores ranked first in sales with specialty stores a close second.

Percent of Women's Denim Jeans Purchases by Type of Outlet, 1981

	Units	Dollars
Department stores	38.4%	35.8%
Specialty stores	29.4	33.9
Discount stores	25.7	21.1
Variety stores	3.4	2.8
Mail order	1.1	1.1
Other	5.6	5.3

Percent of Total Jeans Purchases by Month, 1981

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units	100.0%	7.0	6.3	8.1	8.8	8.5	6.8	8.1	14.6	7.9	7.4	7.4	9.1
Dollars	100.0%	6.2	6.3	7.7	8.2	8.6	7.1	7.4	13.7	8.3	8.4	7.6	10.5

(continued)

CONSUMER BUYING HABITS

Jeans

Percent of Jeans Purchases by Price Point, 1981

	Units	Dollars	Average Price
Less than $8.00	13.3%	4.7%	$ 5.70
$8.00 - $11.99	20.4	12.9	10.19
$12.00 - $15.99	22.9	19.9	14.00
$16.00 - $19.99	19.2	21.7	18.21
$20.00 - $29.99	18.8	28.7	24.60
$30.00 & over	5.4	12.1	36.11

Source: NPD Research Inc.

The Teenage Market

The SEVENTEEN Magazine 1981 Spring Apparel Buying Study was conducted in order to acquire information on the purchasing power and fashion preferences of teenage girls. Areas of specific interest included total expenditures for a wide variety of items, as well as the number of girls purchasing and the number of items purchased.

Questionnaires were mailed in May 1981 to 2,000 members of SEVENTEEN's Consumer Panel, a representative cross section of the teenage market. The first 1,060 returns were processed and form the basis of the study. Survey results have been projected to the total teenage market by SEVENTEEN, as noted below.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Jackets			
Ski jackets	2,714	2,877	$ 139,937
Blazers	2,648	3,787	163,636
Parkas	758	826	36,154
Jackets - blouson	559	609	20,822
- bomber	146	149	4,342
Leather/suede jackets	625	638	45,458
Fur coats (real)	253	255	32,732
Pea coats	182	183	9,492
Fur jackets (fake)	67	68	3,072
Total buying jackets	6,001	9,392	455,645
Skirts			
Knee-length	5,801	12,530	315,380
Below knee-length	5,628	10,299	255,209
Total buying skirts	9,341	22,829	570,589

(continued)

Teenage Buying Trends for Sportswear & Separates
(continued)

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Pants			
Shorts	9,221	50,623	$ 554,322
Long, straight leg	6,467	12,093	242,827
Jeans	5,216	22,794	573,041
Narrow-leg	3,020	5,194	174,051
Ski	559	688	30,699
Cuffed pants	439	654	11,792
Wide leg	439	505	14,802
Total buying pants	12,827	92,551	1,601,534
Total buying shirts/blouses	10,698	40,545	678,723
Sweaters			
Pullovers	3,695	8,564	226,175
Turtlenecks	2,355	5,157	121,447
Cardigans (cardigan vest)	1,889	3,684	107,536
Coat sweaters	1,224	1,481	42,105
Sweater jackets	652	756	19,134
Pullover vests	612	1,077	32,493
Total buying sweaters	5,814	20,719	548,890
Tops			
T-shirts	12,281	53,300	575,107
Sweatshirts	3,353	13,345	113,032
Tanks	3,167	7,949	38,473
Halters	2,701	5,105	37,522
Camisoles	2,275	4,573	57,986
Total buying tops	12,667	84,272	822,120

Teen Girls Favorite Skirt Length Trends, 1978-1981

	1981	1980	1979	1978
Total responses	100.0%	100.0%	100.0%	100.0%
Just below the knee	80.8	80.2	70.9	67.5
At the knee	10.9	7.4	6.1	12.3
Midi	5.1	9.2	19.8	14.1
Any and all lengths	1.4	1.5	1.6	1.7
Just above the knee	1.3	1.3	0.4	2.6
Ankle length	0.5	0.4	1.2	1.6
Mini	--	--	--	0.2

Source: SEVENTEEN Magazine,
Spring Apparel Buying Study, 1981

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in November 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES (November): Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.43

Men's Sportswear, Casual Wear and Jeans

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:

- GENERAL STATISTICS ON THE INDUSTRY.................... 2
  - EMPLOYMENT & EARNINGS................................ 5
  - CONCENTRATION IN THE INDUSTRY........................ 6
  - LOCATION OF THE INDUSTRY............................. 6
  - MANUFACTURERS' OPERATING RESULTS..................... 8
- PRODUCTION... 9
- SHIPMENTS..15
- PRODUCER PRICE TRENDS..................................19
- FOREIGN TRADE--IMPORTS.................................19
- FOREIGN TRADE--EXPORTS.................................21

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET...................................24
- RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR....26
- RETAIL SALES BY STORE TYPE.............................32
- ADVERTISING..34
- CONSUMER PRICE TRENDS..................................35
- CONSUMER BUYING HABITS.................................35

SCHEDULE OF ADDITIONAL FACT FILES......................45

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E.B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-423-6

Printed in the United States of America

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS & ACTIVE WEAR

Market Trends

The state of the U.S. economy will be the dominant factor affecting men's sportswear sales in 1982. For the 12-month period ending May 1982, National Panel Diary (NPD) reports, issued by an independent research company, indicate that dollar sales of all types of men's and boys' wear were ahead of the previous 12-month period by only 3.1%. Kurt Salmon Associates, management consultants, projected a 4% increase in unit sales of men's and boys' wear for the entire year, with projected dollar sales up 10% over 1981.

Both manufacturers and retailers place much of the blame for this lackluster showing on the economy. They are optimistic, however, that beginning in the fall 1982 season the sales picture will improve as retailers move to reestablish their inventories with fresh goods, and the consumer returns to a buying mood.

Several sportswear items are counted on heavily to revive the category. One of these items is casual slacks. Due to the maturation of the jeans market and the increasing numbers of males in the over-35 age bracket, casual non-denim slacks are assuming a larger share of retail trouser inventories. According to NPD, dollar sales in the men's pants, jeans, slacks and shorts classification gained 5.1% in the year ended May 1982 compared with the previous 12 months.

The boom in men's active sportswear sales continued in 1981 but may have reached its peak, according to some retailers. In order to spice up the category and instill it with a new sales life, designer labels, which for the most part had bypassed active sportswear, are being employed. If growth is to continue in this category, it must come from males who want active sportswear for the active "look," not necessarily as a functional item. Designer labels, it is felt, will help attract this type of customer.

In other sportswear areas, however, the designer label influence is waning. The preponderance of designer names has made it difficult for the average consumer to identify with them (Men's Wear, July 16, 1982). In addition, department and specialty stores have found that developing their own private label goods, which usually means dropping some of the designer lines they carry, results in a unique fashion image for the store.

Men's better sportswear has sold well and now constitutes 10%-20% of most department stores' total men's wear volume (Daily News Record, May 10, 1982). Their continued success is attributed to the typical customer for these goods: a clothes conscious man who buys frequently in all seasons and who, because of his income level, is recession-proof while seeking quality and value in his purchases. Retailers are seeking to attract these upscale customers with upper-moderate and better price points in active-spectator wear.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system.

The estimated shipment value of all products shipped by manufacturers classified in the men's and boys' separate trousers industry (including secondary products and miscellaneous receipts) in 1981, as reported in the 1982 U.S. Industrial Outlook was $2.3 billion, 36.0% higher than in 1977 and a 16.5% jump over the estimated 1980 shipment value.

Estimated 1980 shipment value of all products and miscellaneous receipts from the men's and boys' clothing, n.e.c. (not elsewhere classified) industry, which primarily includes sportswear and outerwear, increased 25% over 1977 to $1.3 billion. This value was up 5.3% over 1980.

Men's & Boys' Clothing, n.e.c. (SIC 2329*)
(Primarily Sportswear/Outerwear)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	553	--
Number of establishments**	na	605	577	632	--
With 20 or more employees	na	407	396	400	--
Total employment (thous.)	43.4	45.6	46.8	43.8	- 4.8%
Production workers (thous.)	37.2	39.1	42.5	38.1	- 4.9
Payroll (mil. $)	$ 371.2	$ 343.3	$ 326.3	$ 258.8	+ 8.1
Value added by manufacture (mil. $)#	745.7	695.1	624.6	542.8	+ 7.3
Value of shipments (mil. $)##	1,331.1	1,263.9	1,184.4	1,065.1	+ 5.3
Capital expenditures, new (mil. $)	15.1	15.3	24.1	20.2	- 1.3

Knit Outerwear Mills (SIC 2253*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	903	--
Number of establishments**	na	884	782	953	--
With 20 or more employees	na	459	455	551	--
Total employment (thous.)	67.1	61.9	72.1	73.0	+ 8.4%
Production workers (thous.)	57.9	53.4	62.8	62.7	+ 8.4
Payroll (mil. $)	$ 637.4	$ 548.1	$ 608.5	$ 582.0	+16.3
Value added by manufacture (mil. $)#	1,339.1	1,096.0	1,202.8	1,159.5	+22.2
Value of shipments (mil. $)##	2,571.7	2,220.8	2,333.3	2,335.9	+15.8
Capital expenditures, new (mil. $)	48.5	35.6	44.2	49.9	+36.2

GENERAL STATISTICS ON THE INDUSTRY

Leather & Sheep-Lined Clothing (SIC 2386*)

	1980	1979	1978	1977	% Change 1980/1979
Number of companies	na	na	na	236	--
Number of establishments**	na	169	186	239	--
With 20 or more employees	na	64	76	80	--
Total employment (thous.)	8.0	7.0	5.8	6.7	+ 14.3%
Production workers (thous.)	7.2	6.3	5.1	5.9	+ 14.3
Payroll (mil. $)	$ 63.5	$ 56.3	$ 50.2	$ 54.7	+ 12.8
Value added by manufacture (mil. $)#	100.8	93.4	74.1	94.8	+ 7.9
Value of shipments (mil. $)##	215.3	210.4	222.9	214.1	+ 2.3
Capital expenditures, new (mil. $)	0.7	1.1	2.6	1.6	- 36.4

Men's & Boys' Shirts & Nightwear (SIC 2321*)

	1981(e)	1980	1979	1978	1977
Number of companies	na	na	na	na	669
Number of establishments**	na	na	779	751	928
With 20 or more employees	na	na	597	580	679
Total employment (thous.)	112.3	115.9	120.7	116.0	114.7
Production workers (thous.)	99.3	103.9	108.4	106.6	103.0
Payroll (mil. $)	na	$ 931.0	$ 885.5	$ 768.2	$ 711.3
Value added by manufacture (mil. $)#	na	1,813.5	1,633.5	1,630.2	1,445.7
Value of shipments (mil. $)##	$4,076.0	3,479.5	3,251.0	3,170.3	2,934.6
Capital expenditures, new (mil. $)	na	42.5	36.2	42.6	25.9

Men's & Boys' Separate Trousers (SIC 2327*)

	1981(e)	1980	1979	1978	1977
Number of companies	na	na	na	na	404
Number of establishments**	na	na	419	511	514
With 20 or more employees	na	na	302	396	335
Total employment (thous.)	62.8	64.1	66.6	65.7	70.9
Production workers (thous.)	55.4	55.8	57.8	58.0	61.9
Payroll (mil. $)	na	$ 528.1	$ 507.7	$ 469.8	$ 474.0
Value added by manufacture (mil. $)#	na	1,102.0	1,050.7	983.0	845.6
Value of shipments (mil. $)##	$2,337.0	2,006.6	1,980.5	1,946.6	1,718.0
Capital expenditures, new (mil. $)	na	20.5	15.2	26.6	22.8

(e) = estimated.
na = not available.
n.e.c. = not elsewhere classified.

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. 1979 and 1978 data on number of establishments include only those with payrolls.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, is covered on page 16.

Source: U. S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978, 1979, 1980;
County Business Patterns 1978, 1979; U.S.
Department of Commerce, Bureau of Industrial
Economics, 1982 U.S. Industrial Outlook.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Average employment in knit outerwear mills during 1981 rose 3.2% to 71.5 thousand employees from 69.3 thousand in 1980. The number of production workers in the industry increased 2.2% to 60.7 thousand. During the same period, average earnings of production workers gained 5.1% to $188.87, despite a 2.3% decline in the number of hours they worked.

The number of employees in both the shirts and nightwear industry and the separate trousers industry fell in 1981, by 1.8% and 5.7% respectively. Production workers employed in these industries declined at the rate of 2.4% in the shirts and nightwear industry and 5.6% in the separate trousers industry.

Employment & Earnings in Men's Sportswear Manufacturing

	January - April		Annual Averages		% Change
	1982	1981	1981	1980	1981/1980
Knit outerwear mills (SIC 2253)					
All employees (thous.)	66.5	69.2	71.5	69.3	+ 3.2%
Production workers (thous.)	55.9	58.7	60.7	59.4	+ 2.2
Avg. weekly earnings	$ 184.85	$ 184.86	$188.87	$179.63	+ 5.1
Avg. hourly earnings	5.24	4.96	5.05	4.69	+ 7.7
Avg. weekly hours	35.3	37.3	37.4	38.3	- 2.3
Men's & boys' shirts & nightwear (SIC 2321)					
All employees (thous.)	92.7	96.0	97.4	99.2	- 1.8
Production workers (thous.)	79.6	82.2	83.7	85.8	- 2.4
Avg. weekly earnings	$ 160.04	$ 158.10	$ 160.92	$ 149.14	+ 7.9
Avg. hourly earnings	4.67	4.43	4.47	4.12	+ 8.5
Avg. weekly hours	34.3	35.7	36.0	36.2	- 0.5
Men's & boys' separate trousers (SIC 2327)					
All employees (thous.)	69.0	71.7	71.5	75.8	- 5.7
Production workers (thous.)	54.3	62.7	62.4	66.1	- 5.6
Avg. weekly earnings	$ 163.28	$ 165.65	$ 168.59	$ 153.28	+10.0
Avg. hourly earnings	4.68	4.84	4.67	4.33	+ 7.8
Avg. weekly hours	35.4	33.7	36.1	35.4	+ 2.0

Source: U. S. Bureau of Labor Statistics, Employment & Earnings, June 1982 (Revised); July 1982.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Number of Men's & Boys' Sportswear Manufacturing Establishments By Employment Size, 1979

	Total No. of Establishments*	No. of Establishments by Employment Size Under 10	10-19	20-49	50-99	100-499	500+
Knit outerwear mills (SIC 2253)	884	82	55	94	57	94	5
Leather & sheep-lined clothing (SIC 2386)	169	73	32	31	17	16	--
Men's & boys':							
Clothing, n.e.c. (SIC 2329)	638	145	86	123	143	137	4
Shirts & nightwear (SIC 2321)	779	120	62	119	120	130	3
Separate trousers (SIC 2327)	419	90	27	54	57	170	17

* Includes only establishments with payrolls
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns 1979.

Concentration Ratios in Men's & Boys' Sportswear Manufacturing, 1977

	Value of Shipments (Mil. $)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Men's & boys' clothing, n.e.c. (SIC 2329)	$ 1,065.1	12%	22%	38%	59%
Knit outerwear mills (SIC 2253)	2,335.9	17	27	46	63
Leather & sheep-lined clothing (SIC 2386)	214.1	16	28	50	78
Men's & boys' shirts & nightwear (SIC 2321)	2,934.6	17	28	48	65
Men's & boys' separate trousers (SIC 2327)	1,718.0	25	40	59	77

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Location of the Industry

Half of all knit outerwear mills operating in 1977 were located in New York State. This state was also the home of more manufacturing establishments engaged in the men's and boys' shirts and nightwear, separate trousers and clothing, n.e.c. industries, as well as the leather and sheep-lined clothing industry, than any other state.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Texas plants classified in the men's and boys' separate trousers industry shipped $346.2 million worth of goods although they represented only 4.9% of all manufacturing establishments in the industry. In comparison, New York State plants, 20.0% of the industry total, shipped $269.6 million in goods.

Leading Manufacturing States in the Men's & Boys' Sportswear Industry, 1977

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Knit outerwear mills (SIC 2253)				
U.S. total	953	551	$ 1,159.5	$ 2,335.9
Leading States:				
New York	477	254	259.5	628.4
New Jersey	98	51	56.5	95.1
Pennsylvania	84	67	206.8	406.0
California	73	33	34.6	57.6
North Carolina	45	30	106.0	217.3
Virginia	10	10	151.1	237.2
Total	787	445	814.5	1,641.6
% of U.S. total	82.6%	80.8%	70.2%	70.3%
Men's & boys' shirts & nightwear (SIC 2321) U.S. total	928	679	1,445.7	2,934.6
Leading States:				
New York	156	69	161.8	463.2
California	130	76	98.8	241.1
North Carolina	85	71	122.9	251.5
Pennsylvania	76	67	126.2	245.8
Alabama	62	60	166.2	320.6
Tennessee	59	54	143.3	290.1
Total	568	397	819.2	1,812.3
% of U.S. total	61.2%	58.5%	56.7%	61.8%
Men's & boys' separate trousers (SIC 2327) U.S. total	514	335	845.6	1,718.0
Leading States:				
New York	103	33	108.3	269.6
Georgia	58	56	107.1	210.4
Pennsylvania	53	42	49.1	80.7
California	41	15	26.2	42.2
Alabama	27	27	56.5	79.2
Texas	25	19	136.0	346.2
Total	277	192	483.2	949.1
% of U.S. total	53.9%	57.3%	57.1%	55.2%

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading Manufacturing States in the Men's & Boys' Sportswear Industry, 1977
(continued)

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Men's & boys' clothing, n.e.c. (SIC 2329) U.S. total	632	400	$ 542.8	$1,065.1
Leading States:				
New York	110	51	66.6	165.0
California	64	29	42.3	82.5
Pennsylvania	56	43	44.5	77.7
New Jersey	35	20	36.9	93.7
Tennessee	27	20	28.3	64.2
Washington	22	19	37.0	74.0
Total	314	182	255.6	557.1
% of U.S. total	49.7%	45.5%	47.1%	52.3%
Leather & sheep-lined clothing (SIC 2386) U.S. total	239	80	94.8	214.1
Leading States:				
New York	116	37	33.7	92.3
California	40	9	12.5	26.9
New Jersey	15	10	11.3	23.3
Massachusetts	8	6	10.7	19.9
Total	179	62	68.2	162.4
% of U.S. total	74.9%	77.5%	71.9%	75.8%

n.e.c. = not elsewhere classified.

Source: Based on the U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series.

Manufacturers' Operating Ratios

Manufacturing Ratios in the Men's & Boys' Sportswear Industry, 1980
(Median Results)

	Current Assets to Current Debt (times)	Net Profit on Net Sales (%)	Net Profit on Net Worth (%)	Net Sales to Inventory (times)
Knit outerwear mills (SIC 2253) (180)*	1.82	1.82%	13.55%	10.8
Leather & sheep-lined clothing (SIC 2386) (34)*	1.84	3.43	27.08	6.1

(continued)

Manufacturers' Operating Ratios

Manufacturing Ratios in the Men's & Boys' Sportswear Industry, 1980
(Median Results)
(continued)

	Current Assets to Current Debt (times)	Net Profit on Net Sales (%)	Net Profit on Net Worth (%)	Net Sales to Inventory (times)
Men's & boys':				
Separate trousers (SIC 2327)(92)*	2.00	1.69	13.03	5.9
Shirts & nightwear (SIC 2321) (156)*	1.88	2.40	15.95	7.1
Clothing, n.e.c. (SIC 2329) (180)*	2.07	3.19	22.74	5.9

n.e.c. = not elsewhere classified
* Number in parentheses refers to the number of reporting firms in each category.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980,
All rights reserved.

PRODUCTION

Based on data compiled by the U.S. Bureau of the Census and other sources, the National Cotton Council of America has compiled estimates on production of men's wear for the year 1981, updating the latest available Annual Survey for 1980 issued by the Census Bureau in the Current Industrial Reports Series.

Production of Reported Types of Men's Sportswear/Casual Wear, 1980, 1981
(Thousands of Units)

	1981 (p)	1980	% Change
Men's active apparel			
Athletic shorts (jogging, tennis)	18,876	17,160	+ 10.0%
Athletic uniforms (including boys')	34,848	33,324	+ 4.6
Warm-up jogging suits (including boys')	21,372	20,952	+ 2.0
Swimwear (including boys')	21,912	20,868	+ 5.0
Dress & sport coats (tailored)	16,320	15,540	+ 5.0
Nontailored men's wear			
Casual sport coats/jackets	756	786	- 3.8
Heavyweight jackets, including ski*	18,984	18,612	+ 2.0
Lightweight jackets, including uniform	27,672	22,248	+ 24.4
Suits, casual	708	742	- 4.6
Dress & sport trousers	123,744	118,980	+ 4.0
Jean-cut trousers (including jeans made of other-than-denim fabrics)	62,988	64,940	- 3.0

(continued)

PRODUCTION

Production of Reported Types of Men's Sportswear/Casual Wear, 1980, 1981
(Thousands of Units)
(continued)

	1981 (p)	1980	% Change
Jeans, dungarees (denim only)	150,960	188,700	- 20.0%
Outerwear shorts (other than athletic)	4,932	4,494	+ 9.7
Separate vests	4,176	4,394	- 5.0
Overalls, work type	2,652	2,952	- 10.2
Other overalls, jumpsuits, coveralls	12,396	13,044	- 5.0
Sport shirts			
Knit	316,032	325,800	- 3.0
Woven	67,020	74,460	- 10.0
Sweatshirts, knit	54,780	53,184	+ 3.0
Sweaters (including sweater vests)	36,360	36,652	- 0.8

(p) = preliminary
* See table below.

Source: National Cotton Council of America, Cotton Counts Its Customers; U.S. Bureau of the Census.

Additional detail on skiwear (included in the above data) is provided by the Census Bureau in the latest annual apparel survey. (The report for 1981 is scheduled for release at the end of 1982).

Production of Men's & Boys' Skiwear, 1979, 1980
(Thousands of Units)

	1980	1979	% Change
Ski jackets	2,556	3,144	- 6.9%
Ski pants	372		

Source: U.S. Bureau of the Census, Current Industrial Reports, Men's & Boys' Outerwear (MA23E(80)-1).

PRODUCTION

Monthly data on production compiled by the Census Bureau among a sample of men's wear manufacturers indicate the following monthly pattern in production in 1981.

Percent of Year's Cuttings by Month, 1981

	Jeans & Dungarees	Jean-cut Casual Slacks	Sport Shirts		Sweaters*
			Knit	Woven	
January	11.4%	9.5%	9.0%	9.1%	5.6%
February	9.1	8.2	9.5	7.3	5.6
March	11.3	9.9	10.2	8.2	6.4
April	9.7	7.8	8.7	9.9	5.9
May	7.7	9.0	9.1	8.6	7.1
June	7.5	9.3	9.0	7.8	8.3
July	7.8	7.8	7.0	7.7	9.4
August	6.6	8.3	7.9	8.7	10.3
September	9.8	11.2	8.2	8.7	12.5
October	7.3	8.2	7.7	9.0	12.4
November	5.8	5.6	7.4	7.9	9.9
December	6.1	5.1	6.2	7.0	6.5
Total	100.0	100.0	100.0	100.0	100.0

* Percent of shipments, not cuttings.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Men's Apparel M23B(81)-12.

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980

	Production (Thous. Units)		% Change
	1980	1979	1980/1979
Men's casual (nontailored) suits	742	833	- 10.9%
Woven fabric:			
All cotton & chiefly cotton	95	117	- 18.8
All man-made & chiefly man-made	372	344	+ 8.1
All wool & chiefly wool All other fabric	135	143	- 5.6
Knit fabric:			
All cotton & chiefly cotton All man-made & chiefly man-made	140	229	
All wool & chiefly wool	na		
All other fabric	na		

(continued)

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980
(continued)

	Production (Thous. Units)		% Change
	1980	1979	1980/1979
Men's casual (nontailored) sport coats & jackets	786	1,365	- 42.4%
Woven fabric:			
All cotton & chiefly cotton	401	850	- 52.8
All man-made & chiefly man-made	79	114	- 30.7
All wool & chiefly wool	204	167	+ 22.1
All other fabric			
Knit fabric:			
All cotton & chiefly cotton	102	234	- 56.4
All man-made & chiefly man-made			
All wool & chiefly wool			
All other fabric			
Men's heavy nontailored outer jackets except ski, including uniform	18,768	20,340	- 7.7
By construction:			
Woven fabric	13,872	15,300	- 9.3
Knit fabric	1,920	1,980	- 3.0
Construction, n.s.k.	2,976	3,060	- 2.7
By fabric:			
All cotton & chiefly cotton	3,876	4,608	- 15.9
All man-made & chiefly man-made	9,984	10,980	- 9.1
All wool & chiefly wool	1,332	1,368	- 2.6
All other fabric	960	684	+ 40.3
Fabric, n.s.k.	2,616	2,700	- 3.1
Uniform jackets	1,812	1,608	+ 12.7
Men's light nontailored outer jackets, including uniform	22,248	21,144	+ 5.2
By construction:			
Woven fabric	13,644	12,660	+ 7.8
Knit fabric	6,840	6,228	+ 9.8
Construction, n.s.k.	1,764	2,256	- 21.8
By fabric:			
All cotton & chiefly cotton	4,668	5,364	- 13.0
All man-made & chiefly man-made	13,284	11,844	+ 12.2
All wool & chiefly wool	756	672	+ 12.5
All other fabric	3,540	3,264	+ 8.5

(continued)

PRODUCTION

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980
(continued)

	Production (Thous. Units) 1980	Production (Thous. Units) 1979	% Change 1980/1979
Men's separate dress & sport trousers, including uniform	124,011	125,617	- 1.3%
By price (per unit):			
Under $4.25 $4.25 to $5.00	3,868	5,684	- 31.9
$5.00 to $8.99	36,055	42,791	- 15.7
$9.00 to $12.49	50,658	45,402	+ 11.6
$12.50 & over	26,355	23,695	+ 11.2
Price line, n.s.k.	7,075	8,045	- 12.1
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	10,272	11,727	- 12.4
Man-made/wool blends, chiefly man-made	8,217	8,523	- 3.6
All man-made & chiefly man-made, except man-made/wool blends	52,508	56,470	- 7.0
All wool & chiefly wool	7,173	5,979	+ 20.0
All other fabric	5,086	4,509	+ 12.8
Knit fabric:			
All cotton & chiefly cotton	3,292	3,289	+ 0.1
All man-made & chiefly man-made	29,653	27,116	+ 9.4
All wool & chiefly wool All other fabric	54	11	+390.9
Fabric, n.s.k.	7,756	7,993	- 3.0
Uniform trousers	5,032	4,433	+ 13.5
Men's jeans & dungarees	188,700	167,371	+ 12.7
All cotton & chiefly cotton	184,532	165,113	+ 11.8
All man-made & chiefly man-made	4,168	2,258	+ 84.6
Men's jean-cut casual slacks	64,940	64,447	+ 0.8
Woven fabric:			
All cotton & chiefly cotton	49,207	49,297	- 0.2
All man-made & chiefly man-made	13,037	10,726	+ 21.5
All other fabric	na	na	--
Knit fabric:			
All cotton & chiefly cotton All man-made & chiefly man-made All other fabric	2,696	4,424	- 39.1

(continued)

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980
(continued)

	Production (Thous. Units)		% Change
	1980	1979	1980/1979
Men's shorts, excluding athletic shorts	4,494	4,870	- 7.7%
By fabric:			
All cotton & chiefly cotton	2,548	2,916	- 12.6
All man-made & chiefly man-made	1,917	1,833	+ 4.6
All other fabric Fabric, n.s.k.	29	121	- 76.0
By construction:			
Woven fabric	2,645	2,851	- 7.2
Knit fabric	1,849	2,019	- 8.4
Men's woven sport shirts	74,460	84,468	- 11.8
All cotton & chiefly cotton	16,620	26,136	- 36.4
All man-made & chiefly man-made	52,920	54,312	- 2.6
All wool & chiefly wool All other fabric	2,112	876	+141.1
Fabric, n.s.k.	2,808	3,144	- 10.7
Men's knit sport shirts, except sweatshirts	325,800	291,588	+ 11.7
By fabric:			
All cotton & chiefly cotton	116,904	153,396	- 23.8
All man-made & chiefly man-made	191,292	124,956	+ 53.1
All wool & chiefly wool All other fabric Fabric, n.s.k.	17,604	13,236	+ 33.0
By type:			
Full open front shirts	13,476	15,252	- 11.6
Partial front opening (golf, polo-type)	78,528	72,576	+ 8.2
T-shirts made for outerwear, including tanktops	213,744	182,568	+ 17.1
Type, n.s.k.	20,052	21,192	- 5.4
Men's sweaters including sweater vests, knit cardigans & pullovers	35,652	33,732	+ 5.7
All cotton & chiefly cotton	624	348	+ 79.3
All man-made & chiefly man-made	22,932	21,420	+ 7.1
All wool & chiefly wool	8,460	8,412	+ 0.6
All other fiber Fiber, n.s.k.	876	1,524	- 42.5

(continued)

PRODUCTION

Production of Men's Sportswear Items by Fabric & Construction, 1979, 1980
(continued)

	Production (Thous. Units)		% Change
	1980	1979	1980/1979
Men's & boys' athletic shorts, including jogging shorts & tennis shorts	33,492	26,664	+ 25.6%
Men's & boys' sweatshirts	69,972	50,208	+ 39.4
Men's & boys' warm-up or jogging suits	20,952	16,476	+ 27.2
Men's & boys' swimwear	20,868	21,672	- 3.7
woven fabric	15,672	16,056	- 2.4
knit fabric	5,196	5,616	- 7.5
Men's & boys' ski jackets, including ski vests	2,556	3,144	- 6.9
Men's & boys' ski pants	372		

na = not available.
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear MA23E(80)-1.

SHIPMENTS

The value of shipments of men's trousers, slacks and shorts rose 14.5% in 1980 to $3.3 million from $2.9 million in 1979. Jeans and dungarees increased 21.1% in value, to $1.4 million, surpassing the shipment value of separate dress and sport trousers ($1.3 million), which rose 7.5% compared with the 1979 value.

Active sportswear items increased faster in value than other men's sportswear items tracked by the Census Bureau in 1980. Men's and boys' athletic shorts rose 40.8%, warm-up or jogging suits 38.3% and sweatshirts 34.4% over their 1979 shipment values.

In the 1982 U.S. Industrial Outlook, the Bureau of Industrial Economics estimates the shipment value of men's and boys' separate dress and sport trousers from all U.S. producers was $1.8 billion, up 3.1% from the 1980 value of $1.6 billion. U.S. manufacturers of men's & boys' shirts and nightwear shipped $3.3 billion worth of these goods, a leap of 14.9% over the previous years total of $2.8 billion.

SHIPMENTS

Value of Shipments of Specified Men's Sportswear Items By All U.S. Manufacturers, 1979, 1980
(Millions of $)

	1980	1979	% Change 1980/1979
Casual (nontailored) suits	$ 35.0	$ 32.8	+ 6.7%
Casual (nontailored) sport coats & jackets	26.9	26.3	+ 2.3
Heavy nontailored outer jackets, excluding ski, including uniform	389.3	390.3	- 0.2
Light nontailored outer jackets, including uniform	218.8	188.7	+ 15.9
Trousers, slacks & shorts, total	3,307.5	2,888.3	+ 14.5
Separate dress & sport trousers, including uniform	1,339.1	1,245.3	+ 7.5
Jeans & dungarees	1,372.5	1,133.0	+ 21.1
Jean-cut casual slacks	567.9	483.8	+ 17.4
Shorts, excluding athletic shorts	28.0	26.2	+ 6.9
Sport shirts, total	1,472.9	1,346.7	+ 9.4
Woven sport shirts	447.6	493.7	- 9.3
Knit sport shirts, excluding sweatshirts	1,025.3	853.0	- 20.2
Sweaters, cardigans, pullovers & sweater vests	303.4	245.6	+ 23.5
Athletic shorts, including jogging & tennis shorts (incl. boys')	87.3	62.0	+ 40.8
Sweatshirts (incl. boys')	258.4	192.2	+ 34.4
Warm-up or jogging suits (incl. boys')	127.6	92.3	+ 38.2
Swimwear (incl. boys')	95.0	87.1	+ 9.1
Ski jackets (incl. boys')	74.8	84.8	+ 3.1
Ski pants (incl. boys')	12.6		

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear (MA23E(80)-1).

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers By Leading States, 1972, 1977

	Value of Shipments		% Change
	1977	1972	1977/1972
Heavy outerwear coats & jackets			
U.S. total	$ 397.3	$ 311.8	+ 27.4%
Leading States:			
New York	63.7	53.5	+ 19.1
Washington	41.6	18.1	+129.8
New Jersey	36.6	21.3	+ 71.8
Pennsylvania	32.2	25.5	+ 26.3
Missouri	28.3	30.1	- 6.0

(continued)

SHIPMENTS

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers By Leading States, 1972, 1977

(continued)

	Value of Shipments		% Change
	1977	1972	1977/1972
Separate dress & sport trousers			
U.S. total	1,308.5	1,388.1	- 5.7%
Leading States:			
Texas	246.7	273.0	- 9.6
New York	167.6	180.8	- 7.3
Tennessee	98.3	155.0	- 36.6
Mississippi	78.7	145.7	- 46.0
Jeans & jean-cut casual slacks			
U.S. total	1,962.8	737.6	+166.1
Leading States:			
Texas	396.5	na	
Tennessee	342.5	na	
Georgia	182.0	na	
Mississippi	130.5	na	
Virginia	124.7	na	
Dress & sport shirts, U.S. total	1,344.6	1,069.5	+ 25.7
Leading States:			
New York	218.9	192.6	+ 13.6
Tennessee	158.3	112.1	+ 41.2
California	140.0	44.8	+212.5
Georgia	137.7	120.3	+ 14.5
Alabama	119.1	112.5	+ 5.9
Knit outerwear sport shirts*			
U.S. total	809.0	382.7	+111.4
Leading States:			
Alabama	126.6	10.9	+1,061.5
New York	87.4	68.8	+ 27.0
Pennsylvania	80.2	na	
North Carolina	75.8	36.4	+108.2
Outerwear, n.e.c., U.S. total	423.3	300.4	+ 40.9
Leading States:			
New York	63.3	47.5	+ 33.3
Tennessee	35.3	13.8	+155.8
Texas	32.6	na	
California	30.9	21.6	+ 43.0
Missouri	30.6	19.3	+ 58.5

(continued)

SHIPMENTS

Leading States

Value of Shipments of Men's & Boys' Sportswear by All Producers By Leading States, 1972, 1977

(continued)

	Value of Shipments		% Change
	1977	1972	1977/1972
Sweaters, knit jackets & jerseys **			
U.S. total	$ 555.5	$ 473.8	+ 17.2%
Leading States:			
New York	220.6	190.1	+ 16.0
Pennsylvania	110.4	108.2	+ 2.0
New Jersey	34.5	19.4	+ 77.8
Knit outerwear sport shirts**			
U.S. total	518.1	342.8	+ 51.1
Leading States:			
North Carolina	95.5	18.4	+419.0
Pennsylvania	93.1	na	
New York	49.1	53.2	- 7.7
Other knit outerwear products**			
U.S. total	689.7	445.0	+ 55.0
Leading States:			
New York	132.2	120.6	+ 9.6
North Carolina	81.6	7.5	+988.0
Wisconsin	39.7	20.1	+ 97.5
California	19.8	na	

na = not available.
n.e.c. = not elsewhere classified
* Includes only knit outerwear sport shirts made in cut-and-sew shops
** Includes shipments of women's and children's products made in knitting mills.

Source: Based on the U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series.

PRODUCER PRICE TRENDS

In June 1982, the producer (wholesale) price of all apparel rose 3.8% from the 1981 average as monitored by the Bureau of Labor Statistics. Over the same time, men's apparel increased at a slightly higher 4.4% rate. The index for lightweight outer jackets moved up 3.8% in June 1982 compared with the 1981 average.

Producer Price Indexes of Selected Men's Sportswear Items
1979 - 1981, June 1982
(December 1977 = 100 unless otherwise indicated)

					% Change	
	June 1982(p)	1981	1980	1979	1981/ 1980	1981/ 1979
All apparel (1967 = 100)	193.0	186.0	172.4	160.4	+ 7.9%	+16.0%
Men's apparel (1967 = 100)	220.2	210.9	200.4	186.0	+ 5.2	+13.4
Jean-cut casual slacks & jeans	na	117.2	117.2	97.9	--	+19.7
Denim jean-cut casual slacks & jeans (Dec. 1981 = 100)	100.1	na	na	na		
Corduroy jean-cut casual slacks & jeans (Dec. 1981 = 100)	100.0	na	na	na		
Knit pullover golf & polo shirts	131.0	na	na	102.1		
Lightweight outer jackets	140.6	135.4	122.5	105.8	+10.5	+28.0

Source: U. S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

U.S. imports of knit shirts increased 9.0% in value to $460.5 million in 1981 on a 12.3% rise in units to 11.5 million dozen. Cotton knit shirts imported into the U.S. paced the increase in this category with a 14.3% gain in value and a 22.7% hike in quantity.

The import value of trousers, slacks and shorts was up 17.0% to $476.5 million over the 1980 value of $407.2 million. Men's and boys' pants and shorts made with man-made fibers rose 35.4% in value and 33.6% in units.

According to the Bureau of Industrial Economics, the quantity of imports in the men's and boys' shirts and nightwear field represented 21.7% of the total available to U.S. consumers in 1981. In the men's and boys' separate trousers category, 20.4% of the total quantity available in 1981 was imported.

FOREIGN TRADE

Imports

Imports of Men's & Boys' Sportswear By Leading Countries of Origin, 1980, 1981

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1981	1980	% Change 1981/80	1981	1980	% Change 1981/80
Trousers, slacks & shorts, total	7,568.1	6,613.6	+ 14.4%	$476,553	$407,246	+ 17.0%
Wool, not knit	170.3	160.6	+ 6.0	32,985	31,058	+ 6.2
Korea	58.0	56.7	+ 2.3	8,530	8,070	+ 5.7
Italy	32.7	27.0	+ 21.1	11,349	9,800	+ 15.8
China	19.5	16.5	+ 18.2	2,073	1,636	+ 26.7
Cotton, not knit	5,217.1	4,821.0	+ 8.2	345,216	303,531	+ 13.7
Hong Kong	2,043.8	2,240.8	- 8.8	163,823	163,344	+ 0.3
China	794.4	696.0	+ 14.1	33,616	24,226	+ 38.8
Philippine Republic	305.5	179.1	+ 70.6	20,933	11,830	+ 76.9
Man-made fibers, not knit	2,180.7	1,632.0	+ 33.6	98,352	72,657	+ 35.4
Taiwan	1,315.3	809.7	+ 62.4	54,214	32,761	+ 65.5
Mexico	271.9	462.1	- 41.1	12,868	19,054	- 32.5
China	152.4	10.7	+1,324.3	6,413	614	+944.5
Sweaters, total	2,258.0	2,250.1	+ 0.3	171,267	147,853	+ 15.9
Cashmere, wholly or in part	17.3	19.4	- 10.8	9,723	8,401	+ 15.7
Hong Kong	6.2	3.7	+ 67.6	2,718	1,320	+105.9
England	5.5	8.2	- 32.9	4,343	4,660	- 6.8
Sheep-like hair, except cashmere	92.2	72.3	+ 27.5	10,114	7,084	+ 42.8
Hong Kong	49.9	37.5	+ 33.1	5,470	3,438	+ 59.1
Wool, nspf, knit	536.1	414.1	+ 29.5	59,226	42,821	+ 38.3
Hong Kong	228.7	197.0	+ 16.1	24,911	18,255	+ 36.5
Cotton, knit	116.8	116.0	+ 0.7	11,699	9,945	+ 17.6
Hong Kong	58.5	50.6	+ 15.6	6,377	4,587	+ 39.0
Taiwan	17.4	15.6	+ 11.5	1,383	988	+ 40.0
Man-made fibers, knit	1,495.6	1,628.3	- 8.1	80,505	79,602	+ 1.1
Korea	568.7	604.5	- 5.9	29,712	28,308	+ 5.0
Taiwan	552.3	704.7	- 21.6	34,180	37,108	- 7.9
Knit shirts, total	11,511.1	10,245.3	+ 12.3	460,551	422,673	+ 9.0
Cotton	5,852.1	4,770.8	+ 22.7	244,851	214,115	+ 14.3
Hong Kong	1,420.6	1,154.3	+ 23.1	75,511	63,544	+ 18.8
Pakistan	680.1	543.4	+ 25.1	5,359	4,071	+ 31.6
China	676.5	333.5	+102.8	15,217	6,174	+146.5
Wool	65.1	75.5	- 13.8	7,895	8,581	- 8.0
Hong Kong	48.7	56.6	- 14.0	5,430	5,811	- 6.6
Man-made fibers	5,593.9	5,399.0	+ 3.6	207,805	199,977	+ 3.9
Korea	2,496.7	1,899.0	+ 31.4	90,821	62,071	+ 46.3
Taiwan	1,499.3	1,912.3	- 21.6	60,953	77,262	- 21.1

(continued)

Imports

Imports of Men's & Boys' Sportswear By Leading Countries of Origin, 1980, 1981 (continued)

	Quantity (Thous. Doz.) 1981	Quantity (Thous. Doz.) 1980	% Change 1981/80	Value* (Thous. $) 1981	Value* (Thous. $) 1980	% Change 1981/80
Other shirts, not knit, total	15,756.4	14,980.7	+ 5.2%	$631,863	$581,925	+ 8.6%
Sport shirts, cotton corduroy	161.3	139.6	+ 15.5	9,800	8,847	+ 10.8
China	91.7	21.5	+326.5	5,124	1,092	+369.2
Taiwan	33.3	36.4	- 8.5	2,184	2,344	- 6.8
Sport shirts, cotton, except corduroy	4,757.2	4,871.7	- 2.3	196,356	189,999	+ 3.3
Hong Kong	1,563.4	1,860.5	- 16.0	75,101	81,989	- 8.4
Taiwan	560.6	538.7	+ 4.1	21,401	19,965	+ 7.2
Wool	154.2	211.1	- 27.0	12,197	17,317	- 29.6
Korea	134.0	177.5	- 24.5	9,878	13,702	- 27.9
Man-made fibers	10,683.7	9,758.3	+ 9.5	413,510	365,762	+ 13.0
Korea	6,281.3	5,802.4	+ 8.2	224,339	203,270	+ 10.4
Taiwan	2,830.6	2,665.2	+ 6.2	117,171	105,900	+ 10.6

nspf = not specially provided for.

* Value stated is the C.I.F. (cost, insurance, freight) value, which represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
December 1980, 1981.

Exports

Trousers, slacks and shorts exports by U.S. manufacturers fell sharply to 2.6 million dozen in 1981, down 62.6% from the previous year, with an export value of $130.2 million, a 26.2% drop, according to the Bureau of the Census. Cotton denim jeans exports declined 83.1% in quantity and 41.0% in value.

Exported knit shirts rose 35.1% in quantity in 1981 to 2.2 million dozen but gained only a small 3.8% in value to $36.4 million compared with $35.1 million in 1980.

FOREIGN TRADE

Exports

U.S. producers of men's and boys' shirts and nightwear exported 3.6% of their total product shipments in 1981, according to the Bureau of Industrial Economics, while producers of men's and boys' separate trousers exported 2.7% of their shipments.

Exports of Men's & Boys' Sportswear By Leading Countries of Importation, 1980, 1981

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1981	1980	% Change 1981/80	1981	1980	% Change 1981/80
Trousers, slacks & shorts, total	2,602.7	6,963.8	- 62.6%	$130,162	$176,272	- 26.2%
Not knit, total	2,208.2	6,415.7	- 65.6	117,536	164,706	- 28.6
Trousers & slacks:						
Denim, cotton, including brushed denim	725.4	4,294.4	- 83.1	66,332	112,492	- 41.0
Japan	113.0	303.5	- 62.8	13,924	19,791	- 29.6
Mexico	112.9	2,495.2	- 95.5	5,365	9,234	- 41.9
England	111.1	319.1	- 65.2	14,293	25,659	- 44.3
Cotton	653.3	965.6	- 32.3	23,925	29,015	- 17.5
Japan	96.4	46.5	+107.3	3,934	2,235	+ 76.0
Sweden	66.2	118.1	- 43.9	2,139	1,649	+ 29.7
France	53.2	98.0	- 45.7	1,919	1,537	+ 24.8
Man-made fibers	584.5	988.1	- 40.8	20,073	19,018	+ 5.5
Mexico	303.0	689.0	- 56.0	5,440	6,812	- 20.1
Shorts:						
Cotton	12.5	8.8	+ 42.0	368	344	+ 7.0
Man-made fibers	217.4	137.0	+ 58.7	5,849	3,238	+ 80.6
Costa Rica	84.7	25.2	+236.1	2,287	651	+251.3
Dominican Republic	69.1	27.6	+150.3	2,023	677	+198.8
Trousers, slacks & shorts:						
Wool	15.1	21.8	- 30.7	989	599	+ 65.1
Trousers, slacks & shorts, knit, total	394.5	548.1	- 28.0	12,626	11,566	+ 9.2
Trousers & slacks:						
Cotton	141.8	143.8	- 1.4	5,518	6,247	- 11.7
North Antilles	27.4	35.8	- 23.5	622	1,064	- 41.5
Mexico	22.6	19.2	+ 17.7	894	776	+ 15.2
Man-made fibers	174.5	358.2	- 51.2	5,058	3,667	+ 37.9
Mexico	68.2	201.8	- 66.2	1,513	1,342	+ 12.7

(continued)

FOREIGN TRADE

Exports

Exports of Men's & Boys' Sportswear By Leading Countries of Importation, 1980, 1981

(continued)

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1981	1980	% Change 1981/80	1981	1980	% Change 1981/80
Shorts:						
Cotton	31.6	25.2	+ 25.4%	$ 1,038	$ 885	+ 17.3%
Dominican Republic	7.2	na	na	140	na	na
Man-made fibers	46.3	20.9	+121.5	1,012	767	+ 31.9
Federal Republic of Germany	24.6	na	na	282	na	na
Shirts, total	2,622.4	2,216.3	+ 18.3	52,071	50,231	+ 3.7
Not knit, total	463.7	618.1	- 25.0	15,641	15,132	+ 3.4
Sport shirts, cotton	183.3	173.2	+ 5.8	4,837	4,278	+ 13.1
Japan	57.0	18.8	+203.2	1,739	824	+111.0
Mexico	56.8	33.4	+ 70.0	1,098	814	+ 34.9
Sport shirts, man-made fibers	173.8	351.8	- 50.6	5,495	6,919	- 20.6
Mexico	110.7	227.5	- 51.3	2,856	3,485	- 18.0
Wool	10.0	10.3	- 2.9	879	740	+ 18.8
Textile materials, not named above	96.6	82.8	+ 16.7	4,430	3,195	+ 36.6
Bermuda	24.6	25.3	- 2.8	840	879	- 4.4
Shirts, knit, total	2,158.7	1,582.2	+ 35.1	36,430	35,099	+ 3.8
Sport shirts, cotton	503.4	420.1	+ 19.8	14,124	14,042	+ 0.6
Canada	101.8	29.2	+248.6	1,503	447	+236.2
Mexico	90.5	68.1	+ 32.9	3,051	2,674	+ 14.1
T-shirts, excluding all-white, cotton	1,256.8	924.4	+ 36.0	17,354	13,300	+ 30.5
France	341.2	108.2	+215.3	2,899	1,070	+170.9
T-shirts, excluding all-white, man-made fibers	245.9	154.5	+ 59.2	4,218	3,526	+ 19.6
England	42.1	12.6	+234.1	689	448	+ 53.8
Mexico	29.9	7.2	+315.3	531	153	+247.1
Federal Republic of Germany	27.4	10.0	+174.0	293	116	+152.6
Wool	8.3	14.0	- 40.7	734	754	- 2.6
Textile materials, not named above	144.3	85.2	+ 69.4	5,411	3,477	+ 55.6
Federal Republic of Germany	32.3	na	na	1,001	na	na

(continued)

FOREIGN TRADE

Exports

Exports of Men's & Boys' Sportswear By Leading Countries of Importation, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value* (Thous. $)		% Change
	1981	1980	1981/80	1981	1980	1981/80
Sport shirts & sweatshirts of man-made fibers, knit	592.9	370.1	+ 60.2%	$22,187	$13,594	+ 63.2%
England	164.9	34.7	+375.2	5,408	1,478	+265.9
Federal Republic of Germany	141.8	44.5	+218.6	4,029	1,764	+128.4
Sweaters, knit, total	78.2	81.4	- 3.9	4,330	3,646	+ 18.8
Wool	11.3	6.0	+ 88.3	947	580	+ 63.3
Cotton	24.9	25.2	- 1.2	1,062	899	+ 18.1
Man-made fibers	42.0	50.2	- 16.3	2,321	2,167	+ 7.1
Sweatshirts, cotton, knit	2,189.4	3,272.7	- 33.1	73,487	90,615	- 18.9

na = not available

* The export value is equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of export.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410,
December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to Census Bureau estimates of the U.S. population in 1981 (based on 1980 census data), males aged 25-34 accounted for the largest percentage (17.3%) of the adult male population 15 years of age or older. However, population projections made by the Census Bureau (based on 1970 census data) indicate that by 1990, men in the 35-44 year old age bracket will increase some 60% and constitute 15.2% of the male population compared with a 17.2% share for the 25-34 year olds. By the year 2000, the 25-35 year old age group will slide to 13.5% of males, to be surpassed not only by the 35-44 year olds (16.0% of all males) but also by those from 45-59 years of age (18.9%) and those 60 years or older (13.9%).

A new Census Bureau report on population projections based on 1980 census information, which may cause some changes in the data listed in the table below, is not scheduled to be published until mid-1983.

THE POTENTIAL MARKET

Male Population of the U.S., 1980 & Projections to 2000*
(In Millions)

	1981	1990	2000	% Change 2000/1981	Percent of Total Males 1981	Percent of Total Males 1990	Percent of Total Males 2000
U.S., total	111.4	118.0	126.1	+ 13.2%	100.0%	100.0%	100.0%
Under 15 years	26.2	28.3	29.2	+ 11.4	23.5	24.0	23.1
15 years & older	85.2	89.7	96.9	+ 13.7	76.5	76.0	76.9
15-19 years	10.4	8.5	10.0	- 3.8	9.3	7.2	7.9
20-24 years	10.9	8.8	8.3	- 23.8	9.8	7.5	6.6
25-34 years	19.3	20.3	17.0	- 11.9	17.3	17.2	13.5
35-44 years	13.0	17.9	20.2	+ 55.4	11.7	15.2	16.0
45-59 years	16.4	17.3	23.8	+ 45.1	14.7	14.7	18.9
60 years & older	15.3	16.9	17.5	+ 14.4	13.7	14.3	13.9
Median age (years)	29.1	31.6	34.1	+ 17.2			

(p) = preliminary

* These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level. The projections were produced in 1977 and are subject to revision based on the 1980 Census of Population results.

Source: U.S. Bureau of the Census,
Current Population Reports P-25 Nos. 704, 917

The following table covers estimates on the current adult male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health, Education and Welfare (now renamed the Department of Health and Human Services) and the U.S. Census Bureau.

Close to 2.5 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	75,274	10,237	27,023	35,529	2,485
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	16,937	5,119	6,925	4,742	151
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	31,464	3,764	13,323	14,001	376
Percent	41.8%	5.0%	17.7%	18.6%	0.5%

(continued)

THE POTENTIAL MARKET

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)
(continued)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
180-199 lbs.	14,829	903	4,516	8,732	678
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,033	376	1,882	6,022	753
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,011	75	377	2,032	527
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

The National Sporting Goods Association issues an annual report on projected U.S. retail sales of sports apparel and equipment based on purchases made by a panel of 80,000 households nationwide. Projected sales in the table below include active sportswear sales for both men and women, as the NSGA did not separate the data by sex.

For 1981 and 1982, projected sales are for the October through September period.

Retail Sales of Active Sportswear 1981 & Projected Retail Sales for 1982
(Millions of Dollars)

	Estimated 1981	Projected 1982	Average Price 1981
Athletic socks	$ 267.6	$ 281.0	$ 1.74
Bathing suits	860.0	946.0	19.89
Golf clothing	198.0	208.0	na
Down or fiber filled parkas	351.7	376.0	62.10
Elastic waist shorts	334.0	367.0	7.77
Skiwear	257.7	271.0	na
Sweatshirts	191.5	211.0	10.22
Tennis clothing	150.1	158.0	na
Down or fiber filled vests	238.0	243.0	32.78
Warm-up suits	352.2	380.0	26.99

Source: National Sporting Goods Association, *The Sporting Goods Market in 1982*.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

The 1977 Census of Retail Trade contains the latest official information on men's active sportswear sales in specified outlet types. Only stores with payrolls are included in the merchandise line reports and not all store types were required to break down their sales by merchandise category.

In 1977, active sportswear sales in department stores accounted for over half of reported men's activewear sales. Sporting goods stores accounted for an additional 18.7% of sales. Since 1977, many sporting goods stores have increased their efforts to sell soft goods.

Reported Sales of Men's Active Sportswear by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Total reported	29,379	100.0%	$ 949.9	100.0%
Department stores**	6,494	22.1	532.5	56.1
Men's & boys' wear stores	8,251	28.1	104.8	11.0
Family clothing stores	6,535	22.2	90.5	9.5
Sporting goods stores***	3,849	13.1	178.4	18.7
Mail order houses	3,285	11.2	17.6	1.9
All other retail outlets	965	3.3	26.1	2.7

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

***Reported as sales of men's and boys' clothing, except footwear.

Percent of Total Store Sales Accounted For by Men's Active Sportswear Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For By Men's Active Sportswear Sales
Department stores**	$ 76,909.4	0.7%
Men's & boys' wear stores	6,838.8	1.5
Family clothing stores	7,883.6	1.1
Sporting goods stores	4,171.9	4.3

**See footnote in the table above.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

Personal interviews with a nationally-representative sample of 1,004 men 18 years of age and over, done by the Roper Organization in 1980 for Virginia Slims cigarettes, found that 71% of men are involved regularly in some form of sports activity. Thirty percent say they are very active participants in some sort of physical exercise.

A fall 1980 survey conducted among Playboy Magazine subscribers revealed that 92% of the respondents participated in one or more sports activities in the year prior to the survey. In addition, 29% of all respondents planned to participate in a new sport during 1981. On average, each respondent owns three pairs of athletic shorts, two sweatshirts, one warm-up suit and seven pairs of sport/sweat socks.

Consumer purchases of active sportswear for both men and women in 1982 are projected to jump 13%-15%, according to a September 1981 Celanese Fibers survey of the expectations of 93 sportswear buyers in major department and specialty stores located in 20 large U.S. markets. These buyers expect that their active sportswear merchandise mix will contain approximately 75% spectator activewear versus 25% authentic (functional) activewear in 1982. This large percentage of inventory given over to spectator active sportswear reinforces the popular view that even those men and women who do not participate in sports activity want to look as if they do.

Increasingly, non-functional activewear will be worn as informal wear or leisurewear in a variety of different settings. Some of the potential uses of active sportswear are cited in the following table, with the percentage of respondents who believe their use will accelerate in the future.

Activities Where Active Sportswear Will be Worn in the Future

	Warm-up Suits & Sweatshirts	Running/ Jogging Apparel	Tennis & Other Racquet Wear	Beach & Swimwear	Knit tops/ Golf Shirts
Working/daytime wear:					
At home	74%	43%	15%	11%	72%
At the office	*	7	*	*	26
Informal lunch	48	22	33	9	74
After work wear:					
Relaxing around home	91	70	43	26	67
At the movies	48	26	20	11	76
Going shopping	78	41	30	11	72
At cocktail hour	33	15	17	9	67

(continued)

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

Activities Where Active Sportswear Will be Worn in the Future

	Warm-up Suits & Sweatshirts	Running/ Jogging Apparel	Tennis & Other Racquet Wear	Beach & Swimwear	Knit tops/ Golf Shirts
Weekend wear:					
At the beach	46%	61%	41%	na	61%
At a barbeque/cookout	78	54	52	33	76
Traveling	70	50	33	13	67

* Less than 5%
na = not applicable.

Source: Celanese Fibers Marketing Co., Active Sportswear: A major retail classification in the 1980's, Sept. 1981.

Men's Jeans & Casual Slacks

Sales of men's and boys' jeans, the largest dollar volume classification in the men's and boys' apparel field, approached the $4.5 billion mark in 1981, up 12.5% from $4.0 billion in 1980 (Daily News Record June 3, 1982).

Unit sales of men's, women's and children's jeans increased 3% in 1981 to 605 million pairs compared with 586 million in 1980, according to Jeanswear Communications, an industry trade group. Men's jeans sales in units inched upward only 2%. Denim jeans accounted for 84% of all men's jeans sold, corduroy jeans for 12% and other fabrics for the remaining 4%, according to this same source.

Jeans manufacturers are looking to stretch jeans to instill new life into the industry, which many analysts feel has reached the mature stage. In a November 1981 Gallup survey of 1,000 men and women, 45.9% of those aged 35-44, the prime target for stretch jeans, indicated they already have bought a pair or intend to do so within 12 months. Over half of all respondents, who either bought or expect to buy stretch jeans, said the comfort and flexibility of these jeans is their major motivation behind the purchase.

As the sale of jeans slow down, casual slack sales are expected to heat up. The conventional thinking in the slacks industry is that as men grow older, they grow tired of wearing jeans to every occasion and look for a change. According to NPD Research, there were 58.5 million pairs of casual pants sold in 1980, 3.7% more than in 1979. Popular fabrications for casual slacks include sheetings, twills, chinos, canvases and chintz-finished poplins.

In 1977, reported sales of men's jeans and casual slacks totaled $2.8 billion. This total only includes sales in stores which were required to break down their sales by merchandise classification and, within this grouping, only stores with payrolls. Department stores and men's and boys' wear stores both reported over $1 billion in jean and casual slack sales. Combined, they accounted for almost three quarters of reported sales in the category.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Men's Jeans & Casual Slacks

Reported Sales of Specified Men's Jeans & Casual Slacks
By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's jeans & casual slacks	42,493	100.0%	$ 2,791.1	100.0%
Department stores**	7,754	18.3	1,070.9	38.4
Men's & boys' wear stores	16,013	37.7	1,003.7	36.0
Family clothing stores	13,211	31.1	616.1	22.1
Mail order houses	3,646	8.6	59.6	2.1
All other outlets	1,815	4.2	39.8	1.4

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

Percent of Total Store Sales Accounted For by
Men's Jeans & Casual Slack Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For By Men's Jeans & Casual Slack Sales
Department stores**	$ 76,909.4	1.4%
Men's & boys' wear stores	6,838.8	14.7
Family clothing stores	7,883.6	7.8

** See footnote for the previous table.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Other Specified Men's Sportswear

Reported Sales of Other Specified Men's Sportswear Items By Store Type, 1977

(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's dress & sport shirts (woven)	42,404	100.0%	$2,625.2	100.0%
Department stores**	7,702	18.2	1,336.3	50.9
Men's & boys' wear stores	16,894	39.8	798.4	30.4
Family clothing stores	12,578	29.7	412.2	15.7
Mail order houses	3,610	8.5	47.8	1.8
All other outlets	1,620	3.8	30.5	1.2
Men's novelty shirts/knit shirts	23,241	100.0	712.1	100.0
Department stores**	3,893	16.7	373.9	52.5
Men's & boys' wear stores	9,490	40.8	223.4	31.4
Family clothing stores	6,575	28.3	100.9	14.2
Mail order houses	3,283	14.1	13.9	1.9
Men's sweaters	32,829	100.0	689.1	100.0
Department stores**	5,737	17.5	308.2	44.7
Men's & boys' wear stores	13,842	42.2	259.3	37.6
Family clothing stores	9,069	27.6	100.4	14.6
Mail order houses	3,345	10.2	11.3	1.6

* and ** See footnotes for the previous tables.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales RC 77-1.

Percent of Total Store Sales Accounted For by Men's Sportswear Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For By:		
		Dress & Sport Shirts	Novelty & Knit Shirts	Sweaters
Department stores**	$ 76,909.4	1.7%	0.5%	0.4%
Men's & boys' wear stores	6,838.8	11.7	3.3	3.8
Family clothing stores	7,883.6	5.2	1.3	1.3

** See footnote for the table on page 30.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-1.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

Number of Stores & Sales of Men's & Boys' Wear Stores
1978-1981

	1981	1980	1979	1978	% Change	
					1981/1980	1981/1978
Total sales (mil. $)	$7,786	$7,830	$7,830	$7,503	- 0.6%	+ 3.8%
No. of stores*	na	na	18,517	19,866	--	--

* Includes only stores with paryolls.

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S;
County Business Patterns, 1978, 1979.

Men's sportswear sales in men's wear stores rose 3.8% in 1981 compared with 1980, a smaller increase than the overall 5.3% gain registered for the entire store, according to the Menswear's Retailers of America Annual Business Survey. Active sportswear was the hottest sportswear category in 1981, recording a median rise of 18.5% over the previous year. Casual slacks followed with a typical 14.8% sales increase, well over the median sales increase for the entire store.

For the first six months of 1982, sales in men's wear stores with annual sales of at least $1 million were up a median 5.6% over the same 1981 period. Men's wear stores with sales under $1 million did not fare as well. Stores with annual sales of $500,000 to $1 million posted a typical 2.7% sales rise. Stores in the $250,000 to $500,000 range gained 3.5% in sales while stores under $250,000 recorded flat sales in the January-June 1982 period compared with a year ago (Daily News Record, July 27, 1982).

Selected Merchandising & Operating Results in
Men's Wear Stores, 1981
(Median Results)

	Sales			Markdowns, % of Sportswear Sales (37)*	Number of Stock Turns (45)*
	% Change From Last Year (60)*	% To Total Store (71)*	% Within Department (71)*		
Total store	+ 5.3%	100.0%	--	12.9%**	1.9
Sportswear, total	+ 3.8	23.1	100.0%	12.5	2.1
Sport shirts	+ 0.5	8.2	35.2	12.9	2.7
Sweaters	+ 3.8	3.6	16.3	13.2	2.4
Actionwear	+ 18.5	1.0	4.0	14.8	2.2
Casual slacks	+ 14.8	4.1	16.3	12.2	2.1
Jeans	+ 2.9	3.3	15.2	9.7	1.5
Jackets & heavy outerwear	- 2.8	4.1	16.3	14.0	2.0
Coordinated leisurewear	- 9.8	0.8	2.3	19.7	2.2

* Number in parenthesis refers to the number of reporting firms in each category.
** Represents median markdown percentage of the total store.

Source: Menswear Retailers of America,
1981 Annual Business Survey.

RETAIL SALES BY STORE TYPE

Department Stores

Number of Stores & Retail Sales of Department Stores, 1978-1981

	1981	1980	1979	1978	1981/80	1981/78
Total sales (mil. $)	$103,609	$94,705	$90,006	$84,496	+ 9.4%	+ 22.6%
No. of stores	na	na	9,013	8,546	--	--

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S;
County Business Patterns, 1978, 1979.

Sales of men's sweaters and vests in department stores with annual sales over $1 million rose a median 17.5% in 1980, according to the National Retail Merchants Association, While the typical sales increase for the entire upstairs store was 3.1% and all adult male apparel sales gained 5.7% from their 1979 level, the sportswear categories tracked in the NRMA report exceeded these sales advances.

Men's active sportswear sales gained 15.2% over 1979 sales in these department stores. Casual jackets and slacks also registered a median double-digit gain, of 13.4%, and men's sport shirts sales were up 7.9%.

The covered sportswear categories had median stock turn and sales per square foot figures higher than those for the whole upstairs store and all adult male apparel.

Merchandising & Operating Results in Department Stores
With Sales Over $1 Million
(Median Results)

	Total Upstairs Store (125)*	Adult Male Apparel (121)*	Casual Wear-Jackets & Slacks (60)*	Sport Shirts (33)*	Sweaters & Vests (24)*	Active Sportswear (47)*
Net sales, % change from last year	3.1%	5.7%	13.4%	7.9%	17.5%	15.2%
Sales, % to total store	90.8	11.9	2.0	1.7	0.8	0.8
Gross margin, % of sales, incl. cash discounts	42.3	42.2	41.3	45.7	47.4	44.1

(continued)

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results in Department Stores With Sales Over $1 Million
(Median Results)

	Total Upstairs Store (125)*	Adult Male Apparel (121)*	Casual Wear-Jackets & Slacks (60)*	Sport Shirts (33)*	Sweaters & Vests (24)*	Active Sportswear (47)*
Markdowns, retail, % of sales	12.3%	13.0%	14.0%	13.1%	13.0%	11.8%
Sales promotion, % of sales	3.0	2.7	2.7	3.5	na	3.8
Number of stock turns (times)	2.7	2.7	2.8	4.1	4.6	3.3
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 93.1	$ 135.5	$ 141.3	$ 170.5	na	$ 148.3

* Number in parenthesis refers to the number of reporting firms in each category.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1980"

ADVERTISING

Percent of Year's Total Retailers' Newspaper Ad Linage Done Each Month 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Slacks	3.8%	7.1%	6.8%	8.8%	8.5%	13.4%	5.0%	12.1%	6.5%	7.7%	9.1%	11.2%	100.0%
Sportswear & accessories	5.2	5.8	6.3	6.9	7.2	13.5	5.0	7.9	5.9	8.9	12.2	15.2	100.0

Source: The Advertising Checking Bureau
Neustadt Reports Div. based on newspaper advertising
in Chicago, Philadelphia, Cincinnati, Dallas, Cleveland,
Los Angeles and Washington, D.C.

CONSUMER PRICE TRENDS

In the first six months of 1982, retail prices of men's apparel rose an average 4.3% compared with the same 1981 period, and 0.7% over the 1981 yearly average. Average prices of men's dungarees, jeans and trousers was up 4.6% in the first six months of 1982 from the January through June 1981 period while men's shirts increased 3.2% and men's coats and jackets only 1.0% over the same time period.

Consumer Price Index of Specified Men's Sportswear Items
(Dec. 1977 = 100)

	January - June		Annual Averages		% Change
	1982	1981	1981	1980	1981/1980
Apparel commodities less footwear (1967 = 100)	175.3	171.8	174.0	167.8	+ 3.7%
Men's apparel	114.5	109.7	111.7	106.0	+ 5.4
Coats & jackets	98.1	97.1	98.7	97.4	+ 1.3
Shirts	120.6	116.9	118.7	113.7	+ 4.4
Dungarees, jeans & trousers	109.2	104.4	106.3	100.3	+ 6.0

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following tables on specified men's sportswear items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. All the tables in this section come from this source, and are indicative of retail sales patterns nationwide.

CONSUMER BUYING HABITS

Percent of Panel Households Purchasing Specified Men's Sportswear By Month, 1981

	Any Men's Apparel	Shirts, Sweaters & Other Tops	Pants, Jeans Slacks & Shorts	Swimwear & Sweatsuits
January	23.1%	10.7%	7.0%	0.3%
February	19.6	8.8	5.9	0.3
March	20.5	9.2	7.0	0.2
April	23.0	10.5	9.8	0.4
May	21.1	10.3	8.6	0.7
June	28.0	14.9	11.5	1.3
July	23.2	11.8	9.3	1.2
August	23.4	9.9	9.6	0.5
September	19.3	8.6	7.0	0.3
October	22.9	10.6	7.4	0.2
November	27.7	16.0	7.8	0.4
December	39.1	25.0	13.1	0.3
Average	24.2	12.2	8.7	0.5

Source: National Panel Diary, quoted in
1983 Newspaper Advertising Planbook,
Newspaper Advertising Bureau

Men's Leisure Suits & Jackets

Purchases of Leisure Suits & Jackets by Store Type, 1981

	Units	Dollars
Total	100.0%	100.0%
Department stores	28.4	36.4
National chains	21.9	13.5
Specialty stores	18.7	30.5
Discount stores	18.1	7.3
Other stores, incl. factory outlets	12.9	12.3

Purchases of Leisure Suits & Jackets by Price Points, 1981

	Units	Dollars
Total	100.0%	100.0%
Less than $10.00	15.1	3.1
$10.00 - 19.99	27.6	12.1
$20.00 - 29.99	21.0	16.3
$30.00 - 49.99	15.6	19.8
$50.00 & over	20.7	48.7

(continued)

CONSUMER BUYING HABITS

Men's Leisure Suits & Jackets

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	0.9%	7.5%	9.0%	15.9%	4.2%	6.4%	11.7%	4.4%	9.0%	9.0%	10.5%	11.5%	100.0%
Dollars	0.9	4.6	4.5	14.8	3.0	6.9	6.3	3.1	13.6	12.8	13.9	15.6	100.0

Source of above tables: NPD Research.

Dress & Casual Slacks

Sales of dress and casual slacks averaged $16.20 during the 12-month period between October 1980 and September 1981, 9% higher than the $14.87 average for the preceding 12-month period, according to NPD Research.

Purchases of Dress & Casual Slacks by Style

	Percent of Units Sold	
	Oct. 1980-Sept. 1981	Oct. 1979-Sept. 1980
Total	100.0%	100.0%
Straight legs	72.4	67.9
Flares	20.6	27.4
Tapered legs	2.0	1.4
Bell bottoms	1.3	2.2
Other slacks	3.7	1.1

Purchases of Dress & Casual Slacks by Store Type

	Percent of Units Sold		Average Price Paid	
	Oct. 1980-Sept. 1981	Oct. 1979-Sept. 1980	Oct. 1980-Sept. 1981	Oct. 1979-Sept. 1980
Total	100.0%	100.0%	$ 16.20	$ 14.87
Department stores	31.6	31.0	17.91	16.00
National chains	24.8	21.2	13.80	12.44
Specialty stores	19.3	22.3	na	na
Discount stores	15.4	15.5	na	na
Other stores, incl. factory outlets	8.9	10.0	15.19	11.52

na = not available.

Purchases of Dress & Casual Slacks by Price Point

	Percent of Units Sold	
	Oct. 1980-Sept. 1981	Oct. 1979-Sept. 1980
Total	100.0%	100.0%
Under $8.00	10.8	16.1
$8.00 - 12.99	29.7	35.1
$13.00 - 17.99	26.4	23.2
$18.00 & over	33.1	25.6

Source of above tables: NPD Research.

CONSUMER BUYING HABITS

Men's Jeans

Purchases by Jeans Type

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Straight leg	53.4	44.8
Flares	31.2	41.0
Bell bottoms	4.6	6.8
Tapered	2.0	1.5
Other	8.8	5.9

Purchases of Men's Jeans by Store Type

	Percent of Units Sold		Average Price Paid	
	1981	1980	1981	1980
Total	100.0%	100.0%	$13.72	$12.90
Department stores	22.0	20.4	16.18	14.77
National chains	22.7	23.8	12.38	11.72
Discount stores	23.3	21.6	10.87	10.33
Specialty stores	20.2	22.8	16.35	14.93
Other stores, incl. factory outlets	11.8	11.4	13.38	13.08

Purchases of Men's Jeans by Price Point

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Less than $10.00	24.3	30.2
$10.00 - 14.99	43.0	44.9
$15.00 - 24.99	28.0	21.7
$25.00 & over	4.7	3.2

Source of above tables: NPD Research

Men's Sport Shirts

Knit shirts accounted for 52% of the sport shirt unit purchases made by the members of the NPD Consumer Panel from October 1980 to September 1981. In terms of dollars, knit sport shirts held a 51% share of the market compared with 49% for woven shirts.

CONSUMER BUYING HABITS

Men's Sport Shirts

Purchases of Sport Shirts by Fabric

	Percent of Units Sold	
	Oct. 1980- Sept. 1981	Oct. 1979- Sept. 1980
Total	100.0%	100.0%
Polyester/cotton	45.0	43.0
All cotton	20.0	20.0
Cotton/polyester	13.0	12.0
All polyester	8.0	9.0
All nylon	2.0	2.0
Other fabrics	9.0	9.0
Unreported	3.0	5.0

Purchases of Sport Shirts by Store Type

	Percent of Units Sold		Average Price Paid
	Oct. 1980- Sept. 1981	Oct. 1979- Sept. 1980	Oct. 1980- Sept. 1981
Total	100.0%	100.0%	na
Discount stores	27.0	25.0	$ 6.46
National chains	26.0	24.0	9.08
Department stores	25.0	25.0	11.55
Specialty stores	13.0	15.0	12.29
Other stores, incl. factory outlets	9.0	11.0	na

na = not available

Purchases of Sport Shirts by Price Points

	Percent of Units Sold	
	Oct. 1980- Sept. 1981	Oct. 1979- Sept. 1980
Total	100.0%	100.0%
Less than $5.00	23.3	25.6
$5.00 - 9.99	40.4	42.0
$10.00 - 14.99	22.1	19.4
$15.00 - 19.99	9.0	8.0
$20.00 & over	5.2	5.0

(continued)

CONSUMER BUYING HABITS

Men's Sport Shirts

Purchases of Sport Shirts by Sleeve Length

	Oct. 1980 - Sept. 1981	
	Units	Dollars
Total	100.0%	100.0%
Long/ 3-quarter length	44.9	48.4
Short	52.8	50.2
Sleeveless	2.7	1.4

Source of above tables: NPD Research.

Men's Polo Shirts

Purchases of Polo Shirts by Store Type, 1981

	Units	Dollars
Total	100.0%	100.0%
Discount stores	27.7	17.0
Department stores	23.5	30.5
National chains	21.8	22.5
Specialty stores	14.0	17.9
Other stores, incl. factory outlets	13.0	12.4

Purchases of Polo Shirts by Price Points, 1981

	Units	Dollars
Total	100.0%	100.0%
Less than $4.00	21.7	6.4
$4.00 - 7.99	32.0	21.8
$8.00 - 15.99	34.7	44.8
$16.00 & over	11.6	27.0

Purchases of Polo Shirts by Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	4.1%	4.0%	6.3%	9.9%	11.8%	17.1%	13.2%	7.7%	4.8%	4.6%	5.7%	10.8%	100.0%
Dollars	3.5	3.9	6.4	10.9	10.0	16.9	11.0	6.4	4.3	5.2	6.5	15.0	100.0

Source of above tables: NPD Research.

CONSUMER BUYING HABITS

Men's Sweaters

Purchases of Sweaters by Store Type

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Department stores	35.4	32.6
Specialty stores	19.4	19.3
Discount stores	18.2	19.1
National chains	13.6	20.8
Other stores, incl. factory outlets	13.4	8.2

Purchases of Sweaters by Price Points

	Oct. 1980 - Sept. 1981	
	Units	Dollars
Total	100.0%	100.0%
Less than $10.00	27.6	32.5
$10.00 - 19.99	47.3	49.4
$20.00 & over	25.1	18.1

Source of above tables: NPD Research.

Men's Jackets (Ski Jackets/Golf Jackets/Windbreakers)

Purchases of Ski Jackets, Golf Jackets & Windbreakers by Store Type, 1981

	Units	Dollars
Total	100.0%	100.0%
National chains	26.3	28.3
Discount stores	23.8	22.7
Department stores	18.4	16.6
Specialty stores	16.0	15.4
Other stores, incl. factory outlets	15.5	17.0

Purchases of Ski Jackets, Golf Jackets & Windbreakers by Price Points, 1981

	Units	Dollars
Total		
Less than $14.00	100.0%	100.0%
$14.00 - 29.99	31.2	10.7
$30.00 & over	42.0	33.2
	26.8	56.1

(continued)

CONSUMER BUYING HABITS

Men's Jackets (Ski Jackets/Golf Jackets/Windbreakers)

Purchases of Ski Jackets, Golf Jackets & Windbreakers by Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec	Total
Units	8.2%	7.6%	7.6%	5.7%	5.1%	3.5%	3.1%	5.1%	7.2%	11.9%	12.4%	22.6%	100.0%
Dollars	10.3	7.4	6.3	3.9	3.6	2.2	1.4	5.5	5.6	15.2	13.3	25.3	100.0

Source of above tables: NPD Research.

Men's Shorts

Purchases of Shorts by Store Type, 1981

	Units	Dollars
Total	100.0%	100.0%
Discount stores	34.3	23.1
Department stores	23.8	30.8
National chains	19.1	18.1
Specialty stores	8.3	12.2
Other stores, incl. factory outlets	14.5	15.8

Purchases of Shorts by Price Points, 1981

	Units	Dollars
Total	100.0%	100.0%
Less than $4.00	25.1	7.8
$4.00 - 7.99	32.1	24.9
$8.00 - 11.99	23.9	30.1
$12.00 & over	18.9	37.2

Purchases of Shorts by Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	1.7%	2.1%	4.7%	9.0%	15.6%	30.4%	18.0%	7.7%	4.6%	1.4%	1.3%	3.5%	100.0%
Dollars	2.0	2.3	5.0	9.2	14.5	30.8	18.8	6.7	3.7	2.0	1.2	3.8	100.0

Source of above tables: NPD Research.

Men's Active Sportswear

Discount stores were the most popular place of purchase for men's active sportswear in 1981 with a 29.4% share of the market, according to NPD Research data published in Men's Wear magazine (May 10, 1982).

CONSUMER BUYING HABITS

Men's Active Sportswear

Purchases of Men's Active Sportswear by Store Type

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Discount stores	29.4	27.8
Department stores	23.2	22.3
National chins	22.9	23.8
Specialty stores	12.2	13.9
Other stores, including factory outlets	12.3	12.2

Source: NPD Research.

Men's Swimwear

Purchases of Swimwear by Type

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Boxers	76.5	77.1
Briefs	16.0	15.3
Bikinis	6.1	2.4
Swimwear sets	1.4	5.2

Purchases of Swimwear by Store Type

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Department stores	32.5	23.2
Discount stores	28.3	25.6
National chains	15.4	17.7
Specialty stores	13.3	15.8
Other stores, incl. factory outlets	10.5	17.7

(continued)

CONSUMER BUYING HABITS

Men's Swimwear

Purchases of Swimwear by Price Points

	Percent of Units Sold	
	1981	1980
Total	100.0%	100.0%
Less than $5.00	29.9	40.6
$5.00 - 8.99	34.3	29.9
$9.00 - 12.99	21.2	18.1
$13.00 & over	14.6	11.4

Purchases of Swimwear by Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units	0.5%	1.8%	2.8%	9.7%	15.8%	30.5%	20.5%	7.4%	4.9%	2.2%	3.0%	0.9%	100.0%
Dollars	0.6	2.7	2.6	9.8	16.1	34.7	19.2	6.6	5.1	0.9	1.2	0.7	100.0

Source of above tables: NPD Research.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in November 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES (November): Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.44

Home Textiles

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS.......... 1
GENERAL STATISTICS ON THE INDUSTRY.......... 2
  EMPLOYMENT & EARNINGS.......... 4
  OPERATING RATIOS.......... 5
  LEADING MANUFACTURERS.......... 7
  BY REGION.......... 8
PRODUCTION.......... 9
MATERIALS CONSUMED IN PRODUCTION.......... 12
SHIPMENTS.......... 15
  BY GEOGRAPHIC AREA.......... 20
PRODUCER PRICE TRENDS.......... 22
FOREIGN TRADE -- IMPORTS.......... 22
FOREIGN TRADE -- EXPORTS.......... 24

AT THE RETAIL LEVEL:

THE POTENTIAL MARKET.......... 27
RETAIL SALES BY PRODUCT.......... 29
RETAIL SALES BY TYPE OF OUTLET.......... 31
CONSUMER PRICE TRENDS.......... 36
CONSUMER BUYING HABITS.......... 37

SCHEDULE OF ADDITIONAL FACT FILES.......... 41

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-425-2

Printed in the United States of America

HOME TEXTILES

Market Trends

Home textiles represented an estimated $10.3 billion volume at retail in 1981, according to HFD - Retailing Home Furnishings Textiles Report (May 17, 1982). The market for home textiles has fared better than many other categories during the 1981-82 recession. National Panel Diary (NPD), a market research firm utilizing consumer panels, reported that dollar sales of home textiles increased 6.9% for the 12 month period ended June 1982 compared with the previous 12 months, on a unit sales rise of 1.3%.

Several factors account for the increase. Because in the current recession people have less discretionary income to spend on entertainment, there has been a renewed interest in the home. Home textiles are an inexpensive way to spruce up the home environment. Secondly, more people are choosing to redecorate their homes rather than buy new ones due to the high mortgage rates of the period.

There is also less price-cutting in the home textiles market than in some others because of the large amount of custom items and exclusive collections sold. Realizing that designer collections are one way to avoid price competition and maintain mark-ups, some retailers and manufacturers have signed exclusive contracts with designers for a line of home textiles. Notables such as Halston (with J.C. Penney), Diane Von Furstenberg (with Sears) and Ralph Lauren (with J.P. Stevens) have recently agreed to create home textiles collections.

Manufacturers and retailers constantly court consumers by offering new products, colors, designs and fabrications in the home textiles market. For example, the mini-blind market, estimated by HFD at $750 million at retail in 1981, is expected to grow at a 40% growth rate in the next 2 years. Most of this growth will come from the sale of stock mini-blinds, which were not previously available. Energy saving window treatments, such as retractable shutters, outside blinds and sky light coverings, are also expected to contribute to category sales.

For 1983, the Color Marketing Group expects new emerging colors -- yellow (because it can be used singly or in combination with many other colors) and rose pink -- to become more important to the industry. Another important direction is the graying of many of the shades already on the market.

Many industry sources feel that the shop-at-home custom home textiles market, currently estimated at over $2 billion, will gain significantly in the years ahead, despite the advent of electronic shopping at home. The one thing that will not change, and makes shop-at-home important, is that the buyer will still insist on seeing the merchandise against the backdrop of the home prior to purchase.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census -- the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1980 Annual Survey of Manufacturers, the value of industry shipments (including both primary and secondary products and miscellaneous receipts) produced by manufacturers classified in the curtain and draperies industry reached $1.053 billion, a small 0.3% increase over the 1979 shipment value of $1.050 billion.

As defined on the following page, the home textiles, not elsewhere classified (n.e.c.) industry classification covers a wide range of items. In 1980, the value of industry shipments was estimated at $2.6 billion, up 4.0% over 1979.

A profile of the drapery hardware, blinds and shades industry is included in this Fact File as sales at retail represent a significant share of curtain and drapery department operations. This industry shipped $958.4 million worth of goods in 1980, 8.9% more than in 1979.

Curtains & Draperies
(SIC 2391*)

	1980	1979	1978	1977
Number of companies	na	na	na	1,650
Number of establishments	na	1,430	1,530	1,712
Number with 20 or more employees	na	321	323	324
Employees, total (thous.)	27.4	31.3	34.5	31.7
Production workers (thous.)	23.7	27.2	29.1	27.2
Payroll (mil. $)	$ 228.5	$ 245.3	$ 247.7	$ 224.7
Value added by manufacture (mil. $)#	444.0	488.3	425.6	407.3
Value of industry shipments (mil. $)##	1,053.4	1,050.2	1,081.4	1,013.1
Capital expenditures, new (mil. $)	11.8	15.7	15.7	7.2

Home Textiles, n.e.c.
(SIC 2392*)

	1980	1979	1978	1977
Number of companies	na	na	na	980
Number of establishments	na	862	937	1,051
Number with 20 or more employees	na	388	396	403
Employees, total (thous.)	44.0	46.4	50.2	47.5
Production workers (thous.)	36.7	38.8	42.4	39.8
Payroll (mil. $)	$ 416.7	$ 407.5	$ 411.4	$ 366.4
Value added by manufacture (mil. $)#	969.2	916.4	827.3	782.9
Value of industry shipments (mil. $)##	2,600.1	2,502.4	2,417.6	2,294.0
Capital expenditures, new (mil. $)	16.4	27.9	28.1	26.9

GENERAL STATISTICS ON THE INDUSTRY

Drapery Hardware, Blinds & Shades
(SIC 2591*)

	1980	1979	1978	1977
Number of companies	na	na	na	435
Number of establishments	na	393	417	456
Number with 20 or more employees	na	101	78	85
Employees, total (thous.)	15.7	15.5	15.4	13.6
Production workers (thous.)	11.0	11.6	11.7	10.3
Payroll (mil. $)	$ 199.4	$ 194.9	$ 172.6	$ 145.6
Value added by manufacture (mil. $)#	458.2	438.4	431.8	345.0
Value of industry shipments (mil. $) ##	958.4	879.9	834.1	675.1
Capital expenditures, new (mil. $)	24.0	26.6	19.7	16.7

n.e.c. = not elsewhere classified
n.a. = not available

* SIC (Standard Industrial Classification) covers establishments primarily engaged in manufacturing curtains and draperies from purchased materials.

* SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments primarily engaged in manufacturing of home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Blankets that are made in weaving mills are not included in this industry, nor are tufted bath mats or other tufted items.

* SIC 2591 covers establishments primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

**Each business location is counted as a separate establishment. 1978 and 1979 data on number of establishments includes only those with payrolls.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, is covered on pages 15 and 16.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1978, 1979, 1980
County Business Patterns 1978, 1979.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Total employment in the curtains & draperies industry dropped 1.4% in 1981 to 26.9 thousand and further declined to an average 25.1 thousand over the first seven months of 1982. In the home textiles, n.e.c. classification, total employment fell to an average 48.9 thousand persons, down 2.4% from the 1980 level. During the January - July period, employment in this industry averaged 45.9 thousand in 1982 and 47.4 thousand in 1981.

Production workers in the curtains & draperies industry worked an average of 36.7 hours a week (excluding overtime) in 1981 compared with 36.0 in 1981, a 1.9% increase. During the same period, hourly earnings gained 8.9% to $4.40. For production workers in the home textiles, n.e.c. industry, weekly earnings averaged $188.37 on a typical pay scale of $4.88 per hour (up 8.7% over 1981) and an average 38.6 hour work week (up 1.8% over 1981).

Employment & Earnings in the Home Textiles Industry

	January-July		Annual Average		% Change
	1982	1981	1981	1980	1981/1980
Curtains & draperies (SIC 2391)					
All employees (thous.)	25.1	26.0	26.9	27.2	- 1.1%
Production workers (thous.)	20.4	21.7	22.4	22.9	- 2.2
Avg. weekly earnings	$ 154.63	$ 159.17	$ 161.48	$ 145.44	+ 11.0
Avg. hourly earnings	4.64	4.34	4.40	4.04	+ 8.9
Avg. weekly hours	33.3	36.6	36.7	36.0	+ 1.9
Home textiles, n.e.c. (SIC 2392)					
All employees (thous.)	45.9	47.4	48.9	50.1	- 2.4
Production workers (thous.)	37.9	39.1	40.2	41.2	- 2.4
Avg. weekly earnings	$ 187.17	$ 187.17	$ 188.37	$ 170.17	+ 10.7
Avg. hourly earnings	5.14	4.79	4.88	4.49	+ 8.7
Avg. weekly hours	36.4	38.3	38.6	37.9	+ 1.8

n.e.c. = not elsewhere classified.

Source: Bureau of Labor Statistics,
Employment & Earnings Supplement,
June 1982, September 1982.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Number of Home Textiles Manufacturing Establishments By Employment Size, 1979

	Curtains & Draperies (SIC 2391)		Home Textiles, n.e.c. (SIC 2392)		Drapery Hardware, Blinds & Shades (SIC 2591)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	1,430	100.0%	862	100.0%	393	100.0%
Employment Size:						
Under 10 employees	881	61.6	323	37.5	240	61.1
10-49 employees	420	29.4	313	36.3	104	26.5
50-249 employees	109	7.6	188	21.8	34	8.6
250 or more employees	20	1.4	38	4.4	15	3.8

n.e.c. = not elsewhere classified.
* Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
County Business Patterns 1979.

Employment & Share of Industry Shipments in Large Plants In the Home Textiles Industry, 1981

	Number of Plants		% of Industry Shipments Accounted For By Plants With 100 or More Employees
	With 20+ Employees	With 100+ Employees	
Curtains & draperies (SIC 2391)	339	73	60%
Home textiles, n.e.c. (SIC 2392)	347	98	66
Drapery hardware, blinds & shades (SIC 2591)	137	28	70

n.e.c. = not elsewhere classified.

Source: *Sales & Marketing Management*,
"Survey of Industrial Purchasing Power,"
April, 1982. All rights reserved.

Operating Ratios

In 1977, the 50 largest companies in the drapery hardware, blinds and shades industry accounted for over 88% of the total value of shipments from all 435 companies classified in this industry. In the home textiles, n.e.c. industry, 5.1% of the companies (50 of 980) were responsible for 65.5% of all shipments while in the curtains & draperies industry, 61.6% of all shipments came from 50 of the 1,650 companies primarily engaged in producing curtains & draperies.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Concentration Ratios in the Home Textiles Industry, 1977

	Value of Shipments (Mil.$)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Curtains & draperies (SIC 2391)	$ 1,013.1	25.7%	35.7%	48.9%	61.6%
Home textiles, n.e.c. (SIC 2392)	2,294.0	22.0	33.4	47.9	65.5
Drapery hardware, blinds & shades (SIC 2591)	675.1	45.5	64.6	81.0	88.6

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Manufacturing Ratios in the Home Textiles Industry, 1980
(Median Results)

	Curtains & Draperies (SIC 2391)	Home Textiles n.e.c. (SIC 2392)	Drapery Hardware, Blinds & Shades (SIC 2591)
Number of firms reporting	204	176	78
Current assets to current debt (times)	2.61	1.85	2.75
Net profit on net sales (percent)	6.06%	1.89%	5.79%
Net profit on net worth (percent)	24.02%	17.45%	25.04%
Net sales to net worth (times)	5.13	6.44	4.67
Net sales to inventory (times)	11.7	7.1	9.8

n.e.c. = not elsewhere classified.

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980.
All rights reserved.

GENERAL STATISTICS ON THE INDUSTRY

Leading Manufacturers

Leading Curtain & Drapery Manufacturers, 1980

	Estimated Wholesale Sales (Mil. $)
Burlington House Draperies	$ 150
Aberdeen (Louis Hand & Savoy)	75-80
Home Curtain	70-80
Max H. Kahn Curtain	50
Rennie Curtain	45-50
Miller Curtain	40
Robertson Factories	40
S. Lichtenberg	40
Croscil Curtain	35-40
Cameo Curtain	30-35

Source: HFD-Retailing Home Furnishings, December 28, 1981.

Leading Blanket Manufacturers, 1980

	Estimated Units (Mil. Units)	Estimated Wholesale Sales (Mil. $)
Beacon Manufacturing	7.0+	$ 40
Owens Manufacturing	5.0	17
Chatham Manufacturing	4.0	27
Manetta Mills	4.0	20
Bibb Co.	4.0	16
Fieldcrest Mills	3.0	20
Lebanon Mills	2.0	16+

Source: HFD-Retailing Home Furnishings, October 26, 1981.

GENERAL STATISTICS ON THE INDUSTRY

By Region

Leading Manufacturing States in Home Textiles & Related Products, 1977

	Number of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Curtains & draperies (SIC 2391),				
U.S. total	1,712	324	$ 407.3	$ 1,013.1
Leading States:				
California	389	56	52.2	110.5
New York	175	41	54.5	163.3
Florida	133	8	11.4	23.8
Texas	109	17	24.0	75.2
Massachusetts	49	28	9.7	98.8
North Carolina	33	17	46.1	140.0
Leading states, total	888	167	197.9	611.6
Percent of U.S. total	51.9%	51.5%	48.6%	60.4%
Home textiles, n.e.c. (SIC 2392),				
U.S. total	1,051	403	782.9	2,294.0
Leading States:				
New York	272	85	124.8	356.2
California	123	39	64.1	145.3
Illinois	68	30	49.5	116.4
New Jersey	62	31	58.6	141.7
Georgia	44	27	73.3	287.0
North Carolina	41	24	84.1	305.5
South Carolina	19	13	56.7	200.7
Alabama	19	9	56.6	205.4
Leading states, total	648	258	567.7	1,758.2
Percent of U.S. total	61.7%	64.0%	72.5%	76.6%
Drapery hardware, blinds & shades (SIC 2591), U.S. total	456	85	345.0	675.1
Leading States:				
New York	84	12	20.9	41.2
California	67	14	39.1	75.5
Texas	38	5	7.5	14.9
New Jersey	24	4	20.6	41.1
Maryland	7	3	11.2	37.6

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

The U.S. Bureau of the Census issues quarterly reports on production and shipments of sheets, pillowcases and towels in their Current Industrial Reports series. These reports are based on surveys made among all U.S. firms engaged in the manufacture of these products.

Sheet, towel and pillowcase production declined drastically during the first half of 1982 compared to the same 1981 period. Overall, sheet and pillowcase production was down 16.1% over this time frame. Fitted sheet production fell 17.2%, flat sheets decreased 14.9% and crib sheets were off 16.4% from year-ago levels. U.S. production of pillowcases during the first half of 1982 lagged 16.4% behind the same 1981 period while terry woven towel (finished) production dipped 10.9%.

For the year 1981, sheet and pillowcase production in the U.S. fell a slight 0.2% compared with 1980 to 31.8 thousand dozen. Flat and fitted sheet production rose 1.7% and 1.1%, respectively, but crib sheet (-4.8%) and pillowcase (-1.7%) production declined. Finished terry woven towel output increased 2.2%.

Production of Sheets, Pillowcases & Towels 1980, 1981

	Quantity (Thous. Doz. Units) 1981	1980	% Change 1981/1980
Sheets & pillowcases, total	31,853	31,919	- 0.2%
Crib size sheets	661	694	- 4.8
Other sheets	16,771	16,531	+ 1.4
By type:			
Flat sheets	10,102	9,932	+ 1.7
Polyester/cotton blends	9,722	9,533	+ 2.0
All other fabrics & blends	380	390	- 2.6
Fitted sheets	6,669	6,599	+ 1.1
Polyester/cotton blends	6,355	6,307	+ 0.8
All other fabrics & blends	284	292	- 2.7
Pillowcases, total	14,441	14,694	- 1.7
Polyester/cotton blends	13,781	14,032	- 1.8
All other fabrics & blends	660	662	- 0.3
Finished terry towels, total	44,931	43,957	+ 2.2
By type:			
Sheared	17,283	16,014	+ 7.9
Nonsheared	27,648	27,943	- 1.1
By end use:			
Kitchen	6,140	5,123	+ 19.9
Bath size	21,102	20,146	+ 4.7
Hand, face, guest & fingertip	15,829	16,590	- 4.6
Bath/tub mats	542	469	+ 15.6
All other towels, including larger than bath, i.e. queen/king bath towels, beach towels, etc.	1,318	1,629	- 19.0

(continued)

Production of Sheets, Pillowcases & Towels 1980, 1981
(continued)

	Quantity (Thous. Doz. Units)		
	1981	1980	% Change 1981/1980
Huck & crash towels including dish towels	25,892	27,827	- 6.9%
Terry washcloths	22,670	21,929	+ 3.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels,
MQ-23X(81)-5.

Current production estimates of other types of home textiles, not covered in the U.S. Bureau of the Census reports, are available from the National Cotton Council of America. According to this source, production of curtains made from all types of fabrics rose in 1981 to 108.3 million sets, up 1.6% from 106.6 million sets in 1980. Woven, plastic and non-plastic window shade production declined 15.0% to 39.2 million units in 1981.

U.S. production of blankets and blanketing, measured in linear yards, dropped 9.0% compared with 1980. Drapery, upholstery and slip cover fabrics production increased in 1981 by 2.6% over the previous year.

Production of Selected Home Textiles by Type, 1980, 1981

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Curtains, excluding shower	1,000 sets	108,331	106,596	+ 1.6%
Lace		1,419	1,391	+ 2.0
Other		106,912	105,205	+ 1.6
Cafe, tiered & cottage		60,683	59,493	+ 2.0
Ruffled		5,432	5,173	+ 5.0
Shortie drapes		11,099	10,989	+ 1.0
Tailored		29,698	29,550	+ 0.5
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	831,073	853,699	+ 2.6
Drapery fabrics		466,840	491,278	- 5.0
Mainly woven		402,465	423,515	- 5.0
Lining, woven		64,375	67,763	- 5.0

(continued)

Production of Selected Home Textiles by Type, 1980, 1981
(continued)

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Upholstery & slip covers fabrics	1,000 lin. yds.	364,233	362,421	+ 0.5%
Coated		69,204	71,760	- 3.6
Knit		20,068	20,810	- 3.6
Woven		49,136	50,950	- 3.6
Uncoated, woven		295,029	290,661	+ 1.5
Window shades, woven, plastic & non-woven	1,000 units	39,161	46,072	- 15.0
Slip covers, furniture, excluding plastic	1,000 units	8,638	8,814	- 2.0
Knit		6,910	7,051	- 2.0
Slip covers		2,764	2,820	- 2.0
Throw covers		4,146	4,231	- 2.0
Woven		1,728	1,763	- 2.0
Slip covers		156	159	- 1.9
Throw covers		829	846	- 2.0
Sleep covers		743	758	- 2.0
Comforters & quilts, excluding filling	1,000 units	12,840	13,237	- 3.0
Bedspreads	1,000 units	29,127	29,245	- 0.4
Tailored		17,869	17,692	+ 1.0
Tufted		3,073	3,088	- 0.5
Woven		8,185	8,465	- 3.3
Jacquard		4,041	5,248	- 23.0
Other woven		4,144	3,217	+ 28.8
Mattress coverings, woven & plastic	1,000 units	2,970	3,000	- 1.0
Pads, quilted, excluding fillings	1,000 units	27,077	27,350	- 1.0
Bassinet, crib & furniture, woven & plastic		5,297	5,350	- 1.0
Mattress, woven		21,780	22,000	- 1.0
Pillows & cushions, excluding fillings, woven	1,000 units	61,388	60,335	+ 1.7
Bed		39,167	37,661	+ 4.0
Decorative		22,221	22,674	- 2.0

(continued)

Production of Selected Home Textiles by Type, 1980, 1981
(continued)

	Unit of Measure	1981(p)	1980	% Change 1981/1980
Textile table cloths, napkins & place mats, excluding plastic	1,000 sq. yds.	118,870	112,173	+ 6.0%
Damask		16,644	16,318	+ 2.0
Lace		17,819	16,970	+ 5.0
Other, woven		84,407	78,885	+ 7.0
Coated		21,102	19,721	+ 7.0
Uncoated		63,305	59,164	+ 7.0
Blankets & blanketing	1,000 lin. yds.	81,888	90,012	- 9.0
Bed		74,297	81,761	- 9.1
Thermal woven		19,021	19,467	- 2.3
Cotton		2,024	1,840	+ 10.0
Other		16,997	17,627	- 3.6
Other woven & non-woven		55,276	62,294	- 11.3
Cotton & cotton blends		10,666	11,468	- 7.0
Other		44,610	50,826	- 12.2
Crib & receiving		7,591	8,251	- 8.0
Thermal woven		1,000	1,023	- 2.2
Cotton		105	95	+ 10.5
Other		895	928	- 3.6
Other woven & non-woven		6,591	7,228	- 8.8
Cotton & cotton blends		4,504	4,843	- 7.0
Other		2,087	2,385	- 12.5

(p) = preliminary

Source: National Cotton Council of America,
Cotton Counts Its Customers,
1982 Edition.

MATERIALS CONSUMED IN PRODUCTION

The 1977 census of manufactures report on the home textiles industry included the cost of materials consumed or put into production by plants classified in this industry. Following are findings compared with the previous census data, covering the year 1972.

MATERIALS CONSUMED IN PRODUCTION

Delivered Cost of Materials Consumed in the Production of Home Textiles, 1972, 1977

	Delivered Cost (Mil. $) 1977	Delivered Cost (Mil. $) 1972	% Change 1977/1972
Curtains & draperies (SIC 2391)			
Materials, containers & supplies, total	$ 542.2	$ 374.7	+ 44.8%
Broad woven fabrics:			
Cotton	113.3	102.0	+ 11.1
Rayon & acetate	85.8	74.7	+ 14.9
Nylon	11.0	5.3	+107.5
Polyester	101.6	65.4	+118.6
Other broad woven fabrics	41.4		
Plastics products consumed	1.1	na	--
All other materials, containers & supplies, including n.s.k.	188.3	127.3	+ 47.9
Home textiles, n.e.c. (SIC 2392)			
Materials, containers & supplies, total	1,392.6	863.2	+ 61.3
Broad woven fabrics:			
Cotton	401.9	307.9	+ 30.5
Rayon & acetate	33.3	46.0	- 27.6
Nylon	25.3	5.8	+336.2
Polyester	327.5	121.6	+220.2
Other broad woven fabrics	61.9		
Plastics coated, impregnated or laminated fabrics	57.9	29.3	+ 97.6
Man-made fibers (staple & tow)	33.3	20.9	+ 59.3
Other plastics products consumed	26.8	na	--
All other materials, containers & supplies, including n.s.k.	424.7	331.7	+ 11.3

na = not available.
n.e.c. = not elsewhere classified.
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

Consumption of all types of fibers in curtain production increased 22.8% in 1982 to 89.5 million pounds, according to the Textiles Economics Bureau. Miscellaneous household textiles was the only other category measured by the Bureau which increased its consumption of fibers in 1982.

The amount of fibers used in the manufacture of sheets and other bedding dropped to 504.8 million pounds from 510.7 million pounds in 1981, a 1.2% decline. The biggest decrease in fiber consumption occured in the drapery and upholstery category, which fell 15.0% to 488.7 million pounds.

MATERIALS CONSUMED IN PRODUCTION

Consumption of Fibers in Selected Home Textiles, 1979, 1980

	Millions of Pounds		% Change
	1980	1979	1980/1979
Curtains, total[1]	89.5	72.9	+ 22.8%
Man-made fibers, total	80.1	62.3	+ 28.6
Rayon & acetate	11.5	12.0	- 4.2
Other man-made fibers	68.6	50.3	+ 36.4
Cotton	9.4	10.6	- 11.3
Drapery & upholstery, total[2]	488.7	575.1	- 15.0
Man-made fibers, total	328.8	398.5	- 17.5
Rayon & acetate	128.5	152.5	- 15.7
Other man-made fibers	200.3	246.0	- 18.6
Cotton	148.5	165.1	- 10.0
Wool	11.4	11.5	- 0.9
Bedspread & quilts, total[3]	127.9	137.1	- 6.7
Man-made fibers, total	72.9	76.5	- 4.7
Rayon & acetate	7.5	6.0	+ 25.0
Other man-made fibers	65.4	70.5	- 7.2
Cotton	55.0	60.6	- 9.2
Blankets & blanketing, total[4]	109.1	112.1	- 2.7
Man-made fibers, total	97.2	100.3	- 3.1
Rayon & acetate	2.0	2.1	- 4.8
Other man-made fibers	95.2	98.2	- 3.0
Cotton	7.9	7.3	+ 8.2
Wool	4.0	4.5	- 11.1
Towels & toweling, total[5]	332.8	334.3	- 0.4
Man-made fibers, total	35.3	34.3	+ 2.9
Rayon & acetate	0.9	0.5	+ 80.0
Other man-made fibers	34.4	33.8	+ 1.8
Cotton	297.5	300.0	- 0.8
Sheets & other bedding, total[6]	504.8	510.7	- 1.2
Man-made fibers, total	263.8	254.1	+ 3.8
Rayon & acetate	11.7	12.0	- 2.5
Other man-made fibers	252.1	242.1	+ 4.1
Cotton	241.0	256.6	- 6.1
Miscellaneous household textiles, total[7]	75.9	73.9	+ 2.7
Man-made fibers, total	48.0	45.7	+ 5.0
Rayon & acetate	7.1	8.1	- 12.3
Other man-made fibers	40.9	37.6	+ 8.8
Cotton	27.9	28.2	- 1.1

(Footnotes on next page)

MATERIALS CONSUMED IN PRODUCTION

(Footnotes for Preceding Table)

1. Lace, ruffled, cottage, cafe and tiered types included.
2. Includes furniture slipcovers, vinyl-coated fabrics for upholstery and olefin and saran webbing for outdoor furniture. Also includes the backing and headers of various drapery fabrics. The cotton data includes cotton drapery linings.
3. Includes tailored and throw spreads (tufted and woven), as well as their backing, comforters and their outer shell.
4. Includes woven, knitted, needle-punched and flocked full-sized and crip blankets and electric blanket shells as well as the woven acetate or nylon filament yarn bindings. Sizable poundages of rayon, acrylic, nylon and woll waste are also included.
5. Includes woven hand, bath, dish and other towel types. The large cotton waste poundage used in these products is not included.
6. Sheets includes pillowcases. Other bedding includes the outside cover of quilted pads, mattress pads, mattresses and innersprings, cots and sleeping bags.
7. Includes woven and lace napery, such as tablecloths, napkins and doilies. Also includes man-made fibers used in insect screening and netting as well as cotton used in window shades.

Source: Textile Economics Bureau, Inc.,
Textile Organon, (November 1981).

SHIPMENTS

Shipments of sheets and pillowcases rose 11.5% in value, reaching $1.2 billion in 1981, although the number of units shipped was virtually the same as in 1980, according to the Census Bureau. Flat and fitted sheet shipments were up 12.3% in value on a 1% increase in the quantity shipped. The value of 1981 shipments of finished terry woven towels, $850.4 million, was 5.5% higher than the 1980 shipment value of $806.2 million despite a 3.2% drop in the number of towels shipped by U.S. manufacturers.

Over the first six months of 1982, sheet and pillowcase shipments fell 9.5% in value and 14.5% in units, with the 12.5% drop in the value of pillowcase shipments representing the largest decline. Fitted sheet shipments dropped 12.0% in value and 16.5% in units.

Quantity & Value of Shipments of Sheets, Pillowcases & Towels By All Producers, 1980, 1981

	Quantity (Thous. Doz.)			Value of Shipments (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets & pillowcases, total	31,070	31,086	- 0.05%	$1,226.0	$1,099.1	+ 11.5%
Crib size sheets	616	678	- 9.1	18.1	18.0	+ 0.6

(continued)

Quantity & Value of Shipments of Sheets, Pillowcases & Towels
By All Producers, 1980, 1981
(continued)

	Quantity (Thous. Doz.)			Value of Shipments (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Other sheets	16,310	16,145	+ 1.0%	$941.2	$838.3	+ 12.3%
By type:						
Flat sheets	9,980	9,740	+ 2.5	575.7	511.0	+ 12.7
Polyester/cotton blends	9,562	9,360	+ 2.2	546.2	486.1	+ 12.4
All other fabrics & blends	418	380	+ 10.0	29.5	24.9	+ 18.5
Fitted sheets	6,330	6,405	- 1.2	365.4	327.4	+ 11.6
Polyester/cotton blends	6,002	6,134	- 2.1	343.4	309.8	+ 10.8
All other fabrics & blends	328	271	+ 21.0	22.1	17.6	+ 25.6
By size:						
King size	1,272	1,206	+ 5.5	121.2	107.5	+ 12.7
Queen size	2,315	2,180	+ 6.2	182.0	155.7	+ 16.9
Full size	6,092	6,334	- 3.8	336.0	312.9	+ 7.4
Twin size	6,213	6,008	+ 3.4	286.6	249.0	+ 15.1
Single size & smaller	418	417	+ 0.2	16.4	13.2	+ 24.2
Pillowcases, total	14,144	14,263	- 0.8	266.7	242.8	+ 9.8
Polyester/cotton blends	13,448	13,644	- 1.4	251.4	229.9	+ 9.3
All other fabrics & blends	696	619	+ 12.4	15.3	12.9	+ 18.6
Finished terry towels, total	43,247	44,694	- 3.2	850.4	806.2	+ 5.5
By type:						
Sheared	16,466	16,201	+ 1.6	356.6	333.7	+ 6.9
Nonsheared	26,781	28,493	- 6.0	493.8	472.5	+ 4.5
By end use:						
Kitchen	5,873	5,514	+ 6.5	42.8	40.0	+ 7.0
Bath size	20,291	20,305	- 0.07	541.8	502.5	+ 7.8
Hand, face, guest & fingertip	15,428	16,810	- 8.2	203.4	199.9	+ 1.7
Bath/tub mats	519	480	+ 8.1	18.2	15.1	+ 20.5
All other towels, including queen/king bath towels, beach towels, etc.	1,136	1,585	- 28.3	44.1	48.7	- 9.4
Terry towels sold for further processing elsewhere (i.e. blanks)	5,820	4,905	+ 18.6	81.8	66.0	+ 23.9
Huck & crash towels, including dish towels	26,710	27,956	- 4.5	18.3	17.5	+ 4.6
Terry washcloths	22,283	22,437	- 0.7	120.8	113.4	+ 6.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels,
MQ-23X(81)-5.

Value of Shipments of Sheets, Pillowcases & Towels
Percent by Quarters, 1981

	Year 1981	1st Quarter (Jan.-March)	2nd Quarter (April-June)	3rd Quarter (July-Sept.)	4th Quarter (Sept.-Dec.)
Sheets					
Crib-size	100.0%	21.0%	27.1%	27.1%	24.8%
Flat	100.0	21.4	27.2	23.1	28.3
Fitted	100.0	21.0	27.5	22.4	29.1
Pillowcases	100.0	21.7	27.8	22.0	28.5
Terry woven towels	100.0	22.7	26.6	23.4	27.3
Kitchen	100.0	20.0	27.7	24.3	27.9
Bath size	100.0	22.3	26.7	23.3	27.7
Hand, face, guest & fingertip	100.0	23.9	25.8	23.4	26.8
Bath/tub mats	100.0	24.5	28.9	23.9	22.6

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels.

Percent of the Value of Sheet, Pillowcase & Towel Shipments
Accounted For by Specified Distribution Channels, 1981

		Distribution Channels		
	Total	Branded Retail	Private Ticket Retail	Institutional & Other
Flat & fitted sheets*	100.0%	62.4%	18.1%	19.4%
Pillowcases*	100.0	70.4	17.1	12.5
Terry woven towels	100.0	56.0	14.9	29.1
Bath size	100.0	55.8	15.4	28.8
Hand, face, guest & fingertip	100.0	53.5	12.9	33.6
Terry washcloths	100.0	62.2	16.9	20.9

* Of polyester/cotton blends only.

Definition of terms

Branded Retail - Sales of company brands including premium goods, drops (closeouts) and seconds sold to consumers through all types of retailers.

Private ticket retail - Sales carrying a retail company's label

Institutional & other - Includes Federal & State contract business, commercial accounts (e.g. hotels) sold on a contract basis and dealers involved in resale to the institutional trade.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Sheets, Pillowcases & Towels.

SHIPMENTS

Polyester/cotton sheets and pillowcases with fancy finishes (jacquards, mixed colors, pattern weaves, etc.) accounted for more than two thirds of the total shipment value of these goods in 1981. Almost half (49.5%) of the shipment value of terry woven towels was accounted for by solid color towels.

Percent Distribution of the Quantity & Value of Shipments of Sheets, Pillowcases & Towels by Type of Finish, 1981

	Type of Finish					
	White		Solid Colors		Fancies	
	Quantity	Value	Quantity	Value	Quantity	Value
Flat & fitted sheets*	19.7%	17.7%	15.4	15.5	64.9	66.8
Pillowcases*	18.8	13.1	13.9	15.0	67.3	71.9
Terry woven towels	29.7	22.3	42.3	49.5	28.0	28.2
Bath size	26.9	20.1	44.9	50.5	28.1	29.4
Hand, face, guest & fingertip	34.2	26.9	42.4	49.3	23.4	23.7

*Polyester/cotton blends only.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Sheets, Pillowcases & Towels.

The latest source of information on shipments of home textiles, other than sheets, pillowcases and towels, is the 1977 Census of Manufactures report, from which the following table was extracted.

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Curtains & draperies, except lace total (in millions of pairs or sets)	na	na	--	$ 936.7	$ 626.2	+ 49.6%
Window curtains:						
Wholly or chiefly cotton	14.9	29.4	- 49.3%	45.6	58.8	- 22.4
Wholly or chiefly man-made:						
Glass fiber fabrics	1.6	5.2	- 69.2	7.7	12.0	- 35.8
Other man-made fabrics	37.4	29.7	+ 25.9	162.8	68.3	+138.4
Other materials, including plastics	2.0	5.8	- 65.5	17.7	12.4	+ 42.7

(continued)

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)
(continued)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Draperies:						
Wholly or chiefly cotton	12.5	19.4	- 35.6	127.3	127.9	- 0.5%
Wholly or chiefly man-made:						
Glass fiber fabrics	2.9	8.3	- 65.1	20.1	31.9	- 37.0
Other man-made fabrics	26.0	20.7	+ 25.6	265.6	129.5	+105.1
Other materials including plastics	2.4	2.9	- 17.2	26.6	11.1	+139.6
Curtains & draperies, n.s.k.	na	na	--	311.3	174.3	+ 78.6
Bedspreads & bedsets	na	na	--	400.3	312.5	+ 28.1
Tufted:						
Wholly or chiefly cotton tufting yarns	1.8	11.6	- 84.4	11.0	60.5	- 81.8
Other tufting yarns	2.1	4.3	- 51.2	27.5	23.9	+ 15.1
Jacquard woven	na	7.6	--	na	49.9	--
Quilted	na	na	--	169.8	na	--
Other than tufted, jacquard woven or quilted	8.9	12.9	- 31.0	102.0	80.9	+ 26.1
Other, including n.s.k.	na	na	--	47.0	97.3	- 51.7
Shower & bath curtains, including plastics	18.5	22.5	- 17.8	62.7	44.5	+ 40.9
Comforters & wadded quilts	7.8	7.3	+ 6.8	81.6	32.9	+148.0
Quilted products, except comforters & wadded quilts:						
Mattress protectors	20.3	12.2	+ 66.4	76.6	47.9	+ 59.9
Other, including baby pads	na	na	--	18.7	16.1	+ 16.1
Tablecloths:						
Plastics or plastics-coated or laminated	22.8	na	--	46.6	28.7	+ 62.4
All other tablecloths	na	na	--	57.2	34.9	+ 63.9
Napkins	na	na	--	24.5	6.7	+265.7
Place-mats & place-mat sets, including plastics	na	na	--	17.8	11.2	+ 58.9
Other related articles, except lace (dresser covers & scarves, table sets, doilies, tray cloths, etc.)	na	na	--	21.3	19.3	+ 10.4

(continued)

SHIPMENTS

Quantity & Value of Shipments of Selected Home Textiles Shipped by All Producers, 1972, 1977

(Quantity in million units unless otherwise noted)
(continued)

	Quantity			Value (Mil. $)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Pillows:						
Bed pillows:						
Foam rubber	na	8.3	--	$ 23.0	$ 19.9	+ 15.6%
Other materials	15.8	23.2	- 31.9%	85.7	50.8	+ 68.7
Fancy pillows & cushions:						
Foam rubber	3.7	6.7	- 44.8	21.5	19.1	+ 12.6
Other materials	na	14.1	--	64.2	42.5	+ 51.1
Slip covers:						
Furniture covers, except paper	11.5	na	--	55.5	52.1	+ 6.5
Mattress	12.1	na	--	18.5	11.7	+116.2
Other slip covers	15.3	na	--	6.8		

na = not available
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-I-23E.

By Geographic Area

Value of Shipments of Specified Home Textiles By Leading States, 1972, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Bedspreads & bedsets*, U.S. total	$ 300.4	$ 261.2	+ 15.0%
Leading States:			
Georgia	67.9	62.9	+ 7.9
North Carolina	65.9	67.2	- 1.9
New York	60.3	54.5	+ 10.6
California	21.4	na	--
Leading states, total	215.5	na	
Percent of U.S. total	71.7%	na	

(continued)

SHIPMENTS

By Geographic Area

Value of Shipments of Specified Home Textiles By Leading States, 1972, 1977 (continued)

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Sheets & pillowcases*, U.S. total	$ 479.5	$ 318.5**	+ 50.5%
Leading States:			
California	3.8		
New York	2.0		
Leading states, total	5.8		
Percent of U.S. total	1.2%		
Towels & washcloths, U.S. total	276.6	112.9	+145.0
Leading States:			
New York	2.8		
Percent of U.S. total	1.0%		
Window shades & accessories, U.S. total	140.3	80.9**	+ 73.4
Leading States:			
New York	11.3		
Indiana	10.9		
New Jersey	3.4		
California	3.2		
Wisconsin	2.5		
Leading states, total	31.3		
Percent of U.S. total	22.3%		
Venetian blinds, U.S. total	89.6	29.1**	+207.9
Leading States:			
California	10.6		
Texas	7.7		
New York	3.8		
Florida	2.1		
Leading states, total	24.2		
Percent of U.S. total	27.0%		
Other shades & blinds, n.e.c. & drapery hardware, U.S. total	329.7	160.4**	+105.5
Leading States:			
California	46.1		
New York	11.9		
Florida	5.4		
Leading states, total	63.4		
Percent of U.S. total	19.2%		

(Footnotes continued on next page)

SHIPMENTS

Footnotes For Preceding Table

* Includes only those products not made in weaving mills.
** Shipments by state unavailable for 1972.
na = not available.
n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCER PRICE TRENDS

The rise in the producer (factory) price index of 6 out of 8 home textiles categories exceeded the increase in the index for all commodities (9.1%) between 1980 and 1981. Bath products paced the producer price rise among home textiles with a 15.2% increase. However, there was only a moderate 2.6% gain in the index for bath products between the average for the first 7 months of 1982 and the 1981 annual average.

Producer Price Indexes for Home Textiles, 1979 - 1981 &
January - July 1982
(Dec. 1977 = 100 unless otherwise indicated)

	Jan.-July	Annual Averages			% Change
	1982	1981	1980	1979	1981/1980
All commodities (1967 = 100)	298.8	293.4	268.8	235.6	+ 9.1%
Textile housefurnishings (1967=100)	242.9	226.7	206.9	190.4	+ 9.6
Bed clothes	137.5	129.8	117.3	106.2	+ 10.7
Bedspreads & bedsets (1967=100)	244.1	na	213.8	192.8	--
Flat sheets, except crib size	137.5	130.4	115.5	106.1	+ 12.9
Fitted sheets, except crib size	142.3	133.9	118.2	105.9	+ 13.3
Pillowcases	136.7	na	na	106.8	--
Bath products	146.8	143.1	124.2	110.5	+ 15.2
Towels for home use (1975=100)	na	na	147.4	131.4	--
Shower & bath curtains (1969=100)	208.3	202.6	180.1	157.6	+ 12.5
Window & furniture accessories	135.0	119.3	115.4	111.9	+ 3.4
Draperies (1969=100)	176.0	156.5	153.8	151.2	+ 1.8

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Sheet and pillowcase imports represented only 1.0% of the total value of apparent consumption (manufacturers' shipments minus exports plus imports) of these goods in the U.S. in 1981, up slightly from 0.8% in 1980. Imports of terry woven towels accounted for 9.7% of apparent consumption value, a jump from 7.7% in 1980. In

SHIPMENTS

Imports (continued)

addition, 18.2% of the new domestic supply of terry woven towels were imported in 1981 compared with 14.6% in 1980.

According to Census Bureau figures, 1981 imports of sheets and pillowcases made of vegetable fibers increased 48.9% in value to $9.7 million while the quantity imported rose 67.4% to 3.2 million units. Towels made of vegetable fibers gained 38.1% in value and 52.5% in the number imported.

Imports of Specified Home Textiles
By Leading Country of Origin, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets & pillowcases, of vegetable fibers, nspf	3,156.2	1,885.1	+ 67.4%	$ 9,727	$ 6,531	+ 48.9%
Mainland China	1,645.3	889.7	+ 84.9	3,155	2,051	+ 53.8
Canada	247.2	190.3	+ 29.9	1,711	1,068	+ 60.2
England	222.6	218.6	+ 1.8	1,666	1,791	- 7.0
Curtains & draperies, of vegetable fibers, not ornamented, nspf	50.8	54.7	- 7.1	355	228	+ 55.7
England	29.5	19.2	+ 53.6	249	131	+ 90.1
Shop towels, cotton, not ornamented, jacquared-figured or pile or tufted	112,154.4	94,727.6	+ 18.4	9,761	7,804	+ 25.1
Mainland China	92,660.4	48,432.5	+ 91.3	7,728	3,230	+139.3
Towels, of vegetable fibers, not ornamented, nspf	160,008.6	104,890.5	+ 52.5	90,770	65,720	+ 38.1
Pakistan	87,831.4	47,991.6	+ 83.0	29,300	15,729	+ 86.3
Mainland China	25,052.3	10,651.2	+135.2	10,723	6,559	+ 63.5
India	18,468.6	17,866.2	+ 3.4	7,505	7,513	- 0.1
Blankets & travelling rugs, vegetable & man-made fibers, nspf	1,212.6	1,090.4	+ 11.2	8,608	10,394	- 17.2
Federal Republic of Germany	727.2	720.9	+ 0.9	4,597	6,697	- 31.4
Spain	148.3	174.2	- 14.9	1,984	2,371	- 16.3
Bedding, textile material, nspf (quantity in 1,000 pounds)	3,700.2	4,329.2	- 14.5	18,449	19,511	- 5.4
India	1,310.3	1,556.2	- 15.8	4,964	4,859	+ 2.2
Mexico	866.3	934.6	- 7.3	3,145	2,878	+ 9.3

(continued)

Imports

Imports of Specified Home Textiles
By Leading Country of Origin, 1980, 1981

(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Tablecloths & napkins, of vegetable fibers, not ornamented, nspf	5,204.0	3,617.9	+ 43.8	$13,587	$ 8,924	+ 52.2%
Mainland China	1,114.8	589.3	+ 89.2	2,714	1,368	+ 98.4
Pakistan	976.1	420.6	+132.1	1,718	702	+144.7
India	730.8	640.8	+ 14.0	1,785	1,390	+ 28.4
Blankets & travelling rugs, wool (quantity in 1,000 pounds)	367.7	347.2	+ 5.9	3,276	2,825	+ 16.0
England	140.7	179.3	- 21.5	1,479	1,509	- 2.0

nspf = not specially provided for.

* The C.I.F. value is the import value at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135 December 1980, 1981

Exports

Exports of sheets and pillowcases totaled $112.1 million in 1981, 9.1% of the total value of manufacturers' shipments, according to the Census Bureau. This represents a small decline from the $114.0 million value placed on sheet and pillowcase exports in 1980, when these exports were 10.4% of total shipment value.

In 1981, cotton sheet exports fell 20.8% in value to $40.0 million on a 46.0% drop in the number exported to 8.6 million. Sheets and pillowcases made of textile fibers other than cotton or man-made fibers had an export value of $20.7 million in 1981, 87.3% higher than in 1980.

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Sheets, cotton	8,577.7	15,883.2	- 46.0%	$40,039	$50,535	- 20.8%
England	1,869.1	3,262.5	- 42.7	7,921	11,093	- 28.6
Saudi Arabia	831.6	2,052.9	- 59.5	3,164	4,336	- 27.0
Panama	711.7	369.9	+ 92.4	3,361	1,448	+132.1
Sheets, man-made fibers	7,870.4	7,613.0	+ 3.4	38,899	37,134	+ 4.7
Venezuela	3,585.1	3,211.7	+ 11.6	14,896	11,631	+ 28.1
Canada	1,197.5	675.3	+ 77.3	6,135	5,267	+ 16.5
England	948.6	1,154.8	- 17.9	5,155	6,788	- 24.0
Pillowcases, including bolster cases, cotton	2,178.7	3,357.9	- 35.1	7,210	8,635	- 16.5
England	500.6	1,590.7	- 68.5	1,448	3,529	- 59.0
Panama	356.3	55.5	+542.0	1,066	222	+380.2
Libya	249.1	--	--	595	--	--
Pillowcases, including bolster cases, man-made fibers	1,705.1	2,156.2	- 20.9	5,269	6,664	- 20.9
Canada	631.8	460.2	+ 37.3	1,687	1,489	+ 13.3
England	413.8	841.1	- 50.8	1,591	2,478	- 35.8
Venezuela	154.1	43.3	+255.9	306	118	+159.3
Sheets & pillowcases, textile fibers other than cotton or man-made	4,457.5	2,702.7	+ 64.9	20,673	11,037	+ 87.3
Saudi Arabia	954.0	215.3	+343.1	4,436	863	+414.0
Kuwait	633.0	671.1	- 5.7	1,372	1,167	+ 17.6
England	521.3	307.3	+ 69.6	2,051	1,406	+ 45.9
Bedspreads, cotton	754.5	803.7	- 6.1	7,727	5,983	+ 29.1
Mexico	110.9	132.8	- 16.5	791	562	+ 40.7
Canada	109.7	86.1	+ 27.4	892	670	+ 33.1
Dominican Republic	76.4	46.0	+ 66.1	696	468	+ 48.7
Bedspreads, textile fibers except cotton	1,232.4	868.1	+ 42.0	10,991	7,475	+ 47.0
Mexico	389.0	83.5	+365.9	2,201	399	+451.6
Canada	195.2	156.5	+ 24.7	1,339	1,382	- 3.1

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981 (continued)

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Coverlets, quilts & comforters, cotton	109.6	115.3	- 4.9%	$1,061	$1,319	- 19.6%
Kuwait	15.3	--	--	115	--	--
Coverlets, quilts & comforters, textile materials except cotton	146.0	139.1	+ 5.0	2,222	1,991	+ 11.6
Canada	38.7	46.0	- 15.9	628	768	- 18.2
Mexico	30.8	16.6	+ 85.5	314	213	+ 47.4
Blankets, cotton	651.6	851.9	- 23.5	3,280	2,914	+ 12.6
Mexico	437.1	590.7	- 26.0	2,048	1,525	+ 34.3
Other blankets, except electric, textile materials except cotton	807.8	738.5	+ 9.4	4,467	3,710	+ 20.4
Mexico	205.1	64.7	+217.0	1,016	293	+246.8
Argentina	157.0	114.7	+ 36.9	576	430	+ 33.9
Other bedding, including mattress & pillow covers, textile material, nspf	1,131.2	602.0	+ 87.9	4,293	1,868	+129.8
Chile	257.9	--	--	941	--	--
Panama	137.2	139.3	- 1.5	229	226	+ 1.3
Curtains & drapes, lace or net textile materials	174.9	138.1	+ 26.6	791	455	+ 73.8
Canada	66.0	60.3	+ 9.4	236	165	+ 43.0
Saudi Arabia	58.7	--	--	276	--	--
Other curtains & drapes, cotton	376.1	296.6	+ 26.8	1,786	1,080	+ 65.4
Mexico	158.2	86.3	+ 83.3	567	217	+161.3
Other curtains & drapes, man-made fibers	357.8	233.6	+ 53.2	2,898	2,452	+ 18.2
Canada	180.0	55.1	+226.7	1,136	464	+144.8
Other curtains & drapes, textile materials except cotton & man-made	1,375.4	2,553.5	- 46.1	7,977	8,842	- 9.8
Canada	993.6	2,086.8	- 52.4	5,009	5,431	- 7.8

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Home Textiles By Leading Country of Origin, 1980, 1981
(continued)

	Quantity (Thous. Units)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Towels & washcloths, cotton	10,867.5	15,463.4	- 29.7%	$41,513	$41,780	- 0.6%
Canada	3,064.4	2,175.5	+ 40.8	10,601	7,534	+ 40.7
Saudi Arabia	826.0	730.7	+ 13.0	4,288	1,877	+128.4
Towels & washcloths, textile fibers except cotton	3,106.1	3,634.5	- 14.5	9,813	7,920	+ 23.9
England	450.6	611.3	- 26.3	1,016	454	+123.8
New Zealand	355.4	748.0	- 52.5	1,114	851	+ 30.9
Australia	298.3	297.2	+ 0.4	862	574	+ 50.2
Tablecloths & napkins, cotton	777.0	693.7	+ 12.0	3,166	2,805	+ 12.9
Canada	137.1	137.7	- 0.4	872	971	- 10.2
Australia	107.5	42.3	+154.1	435	149	+191.9
Tablecloths & napkins, textile fibers, except cotton	1,772.2	1,812.4	- 2.2	6,836	5,638	+ 21.2
Canada	916.9	818.3	+ 12.0	2,933	2,397	+ 22.4
England	143.3	91.1	+ 57.3	562	319	+ 76.2

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the carrier as well as any other costs beyond the port of exportation.

nspf = not specially provided for.

Source: U.S. Bureau of the Census,
U.S. General Exports, December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The number of households increased 4.2% to 82.4 million in 1981 compared with 79.1 million in 1980. Since 1970, households have risen 30.0% in number. One of the sparks of this increase is the 75.0% jump in single-person households, well above the increase for any other category, which constituted 22.9% of all households in 1981.

Number of U.S. Households by Household Size, 1970, 1980, 1981

	Number of Households (Mil. Units)			% Change		% of Total Households	
	1981	1980	1970	1981/ 1980	1981/ 1970	1981	1970
Total	82.4	79.1	63.4	+ 4.2%	+ 30.0%	100.0%	100.0%
Household Size:							
1 person	18.9	17.8	10.9	+ 6.2	+ 73.4	22.9	17.2
2 persons	25.8	24.7	18.3	+ 4.4	+ 41.0	31.3	28.9
3 persons	14.6	13.8	10.9	+ 5.8	+ 33.9	17.7	17.1
4 persons	12.8	12.5	10.0	+ 2.4	+ 28.0	15.5	15.8
5 persons	6.1	6.0	6.6	+ 1.7	- 7.6	7.4	10.4
6 or more persons	4.2	4.3	6.7	- 2.3	- 37.3	5.1	10.6

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Characteristics,
Series P-20, Nos. 371, 366.

Apart from replacement sales and purchases made by those who are redecorating existing households, home textiles sales are fueled by the growth of new household formations. One of the determinents of the number of new households is the number of marriages in the U.S. In 1981, there were 2,438,000 marriages, a record number, 1.0% more than the 2,413,000 marriages reported by the Department of Health & Human Services in 1980 and 13.2% higher than in 1975. The annual marriage total has risen each year since 1958, with the exceptions of 1974 and 1975. More importantly, the rate of marriages per 1,000 persons rose to 10.6 in 1981 compared with 10.1 in 1975, indicating that the number of marriages has not risen strictly because of a higher marriage-age population.

Another component of new household formations is the number of housing units under construction. Based on the rate of private housing unit starts in September 1982, the seasonally adjusted annual rate of 1,146,000 starts was 14.4% higher than in last September. This gain was propelled largely by a 73% increase in the annual rate of multi-family housing units started. As the following table shows, while the January to September aggregate number of starts in 1982 was down 13.2%, houses with 3 or 4 units declined only 2.8% and those with 5 or more units were almost even with the same nine month period in 1981.

THE POTENTIAL MARKET

Number & Type of Private Housings Units Started, 1980, 1981 &
January-September 1982
(Thousands of Units)

	January-September			Annual Totals		
	1982	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Private housing units started, total	758.3	873.3	- 13.2%	1,084.2	1,292.2	- 16.1%
Type of unit:						
Single family	474.8	581.3	- 18.3	705.4	852.2	- 17.2
2 units	24.4	31.5	- 22.5	38.2	48.8	- 21.7
3 or 4 units	38.5	39.6	- 2.8	52.9	60.7	- 12.8
5 or more units	220.6	220.8	- 0.1	287.7	330.5	- 12.9

Source: U.S. Bureau of the Census,
Bureau of Industrial Economics.

In the four year period between 1977 and 1981, single family unit starts decreased 34.9%. At the same time, multiple unit starts increased 12.3%. According to the 1980 Census of Housing, 33.0% of all housing in the U.S. was renter-occupied. These apartment dwellers provide another market for home textiles. A study of homeowners and renters, conducted in 1981 by Leo Shapiro and Associates, showed that 54.4% of renters were under 35 years old, 67% had annual incomes less than $20,000 (versus 50% of homeowners) and 25% lived alone.

The number of building permits is a barometer of future construction and, hence, new household formations. In September 1982, the seasonally adjusted annual rate for permits was 1,038,000, up 24.3% from a year ago. As of October, 1982, the outlook for further gains in both housing starts and permits issued began to improve as a result of the decline in loan rates.

Additionally, 45.1% of persons over 4 years old moved between 1975 and 1980, according to the Census Bureau. This also creates opportunities for increased home textile sales, as many of these new households will purchase home textile items to suit their new surroundings.

RETAIL SALES BY PRODUCT

After consultations with major industry sources, HFD Textiles Report issued the following estimates of 1981 sales in specified home textiles categories. The three largest segments of the $10.3 billion industry in 1981 were: bath towels, which contributed 13.4% of total sales, sheets and pillowcases (12.8%), and blinds (10.7%).

RETAIL SALES BY PRODUCT

Retail Sales of Major Home Textiles Categories, 1981

	1981 Sales (Mil. $)
Home textiles sales, total	$ 10,289
Bedding, total*	3,373
Sheets & pillowcases	1,315
Blankets	642
Bedspreads	406
Comforters	593
Bed pillows	225
Mattress pads	192
Window coverings, total*	3,821
Curtains	600
Draperies	977
Shades	404
Blinds	1,105
Woven woods & shutters	165
Hardware	470
Made-to-measure draperies	100
Bath shop, total	2,057
Towels	1,384
Shower curtains	130
Rugs, bath mats, etc.	327
Accessories	216
Decorative home textiles, total	605
Decorative fabrics	420
Decorative pillows	185
Tabletop textiles, total	533
Table linens	320
Kitchen textiles	213

* Excludes sales of these items in the custom-made, shop-at-home market. HFD estimates custom-made curtains and draperies sales in this market at $400 million, and custom-made bedspreads, slipcovers, etc. at $800 million. According to HFD, more than 20,000 retailers are involved to some degree in shop-at-home selling of home textiles.

Source: HFD Textiles Report, May 17, 1982.

RETAIL SALES BY TYPE OF OUTLET

HFD estimated that department stores control 26% of all home textiles sales in 1981, barely ahead of the 25% share of sales done in specialty stores. Discount stores were responsible for 21% of home textiles sales in 1981, according to HFD.

Percent of Dollar Sales of Major Home Textile Categories By Type of Outlet, 1981

	Percent of Sales Done In:			
	Department Stores	Discount Stores	National Stores	All Other Stores*
BEDDING:				
Sheets & pillowcases	35%	29%	26%	10%
Blankets	32	26	27	15
Bedspreads	28	17	32	23
Comforters	30	18	32	20
Bed pillows	26	40	16	18
Mattress pads	25	35	29	11
WINDOW COVERINGS:				
Curtains	28	12	51	9
Draperies	22	13	56	9
Shades	10	15	27	48
Blinds	6	7	11	76
Woven woods & shutters	6	19	29	46
Drapery hardware	5	15	45	35
Made-to-measure draperies	35	5	30	30
BATH SHOP:				
Towels	34	27	24	15
Shower curtains	20	35	20	25
Rugs, bath mats, etc.	31	25	29	15
Accessories	32	10	16	42
DECORATIVE HOME TEXTILES:				
Decorative fabrics	13	5	13	69
Decorative pillows	43	28	24	5
TABLETOP TEXTILES:				
Table linens	45	20	25	10
Kitchen textiles	30	31	29	10

* Predominently independent specialty stores.

Source: HFD Textiles Report, May 17, 1982

RETAIL SALES BY TYPE OF OUTLET

The latest official information on retail sales of specified home textiles is provided by the Census Bureau in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports from the census but not all store types which sell home textiles were required to break down store sales by merchandise category.

According to the census, department stores sold a reported $1.4 billion worth of window and furniture coverings in 1977. Curtain, drapery and upholstery stores did a reported $512 million of business in these items the same year.

Linens and domestics sales in 1977 totaled $229.0 million from mail order retailers and $226.6 million in department stores.

Reported Sales of Specified Home Textiles by Leading Store Types, 1977
(Includes only stores with payrolls)

	Window & Furniture Coverings*		Linens & Domestics**	
	Number of Stores#	Sales (Mil. $)	Number of Stores#	Sales (Mil. $)
Department stores##	7,950	$1,396.9	8,523	$2,515.9
Drapery, curtain & upholstery stores	4,427	512.4	627	31.9
Furniture stores	6,187	209.2	954	27.5
Miscellaneous home furnishings stores	2,847	120.9	1,647	193.9
Variety stores	10,713	127.3	12,573	226.6

* Includes sales of ready-made, custom-made and curtain & drapery fabrics.

** Includes sales of sheets, blankets, towels, table coverings & closet accessories.

# Represents the number of stores of that type selling these items. Each business location is reported separately as a store unit, including each unit in a multi-unit organization.

## Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in the mail order house data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

RETAIL SALES BY TYPE OF OUTLET

Percent of Total Store Sales Accounted For By Home Textile Sales in Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For By: Window & Furniture Coverings	Linens & Domestics
Department stores**	$ 76,909.4	1.8%	3.3%
Drapery, curtain & upholstery stores	648.4	79.0	4.9
Variety stores	6,948.3	1.8	3.3

** See footnote for the previous table.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC77-L.

Department Stores

Home textiles accounted for a median 6.3% of total 1981 sales in department stores with sales over $1 million, according to the Merchandising and Operating Results report issued by the National Retail Merchants Association. Sales of home textiles were a slight 0.4% higher, typically, than last year compared with a median of 6.7% sales rise for the store as a whole (excluding budget departments).

Table linens and other table coverings showed the largest median sales gain among home textiles categories (6.8%), followed by towels (+3.9%) and sheets and pillowcases (+3.6%). Custom draperies and slipcovers in the typical department store declined 0.5% in sales compared with 1980.

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1981
(Median Results)

	Total Upstairs Store (117)*	Domestics, Draperies & Home Goods (112)*	Custom Draperies & Slipcovers (37)*	Bath Shop (47)*
Net sales, % change from last year	+ 6.7%	+ 0.4%	- 0.5%	+ 0.8%
Sales, % to total store	90.1	6.3	0.5	0.4
Sales, % to total division	--	100.0	9.7	6.8
Gross margin, % of sales (including cash discounts)	42.0	42.7	42.2	47.7
Markdowns, % of sales	13.0	9.6	6.9	7.3
Sales promotion, % of sales	3.2	4.1	3.6	3.6
Number of stock turns (times)	2.7	1.9	4.2	1.8
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 111.8	$ 63.2	$ 72.4	$ 72.0

(continued)

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1981
(Median Results)
(continued)

	Linens & Domestics (111)*	Sheets & Pillowcases (56)*	Blankets, Comforters & Bed Pillows (56)*	Table Linens & Other Table Coverings (54)*
Net sales, % change from last year	+ 3.3%	+ 3.6%	+ 1.9%	+ 6.8%
Sales, % to total store	3.9	0.8	1.0	0.9
Sales, % to total division	63.6	13.0	15.4	17.8
Gross margin, % of sales (including cash discounts)	42.5	46.3	43.5	42.7
Markdowns, % of sales	8.5	7.9	8.5	8.7
Sales promotion, % of sales	4.3	5.0	5.5	4.1
Number of stock turns (times)	2.1	2.2	2.1	2.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 86.5	$ 101.6	$ 103.5	$ 76.5

	Towels (49)*	Window & Furniture Coverings (94)*
Net sales, % change from last year	+ 3.9%	+ 1.0%
Sales, % to total store	0.9	1.0
Sales, % to total division	16.5	17.1
Gross margin, % of sales (including cash discounts)	46.1	43.7
Markdowns, % to sales	7.3	11.2
Sales promotion, % to sales	4.1	4.1
Number of stock turns (times)	2.3	1.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 104.0	$ 47.6

* Number in parenthesis represents the number of stores reporting in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1982.

RETAIL SALES BY TYPE OF OUTLET

Curtain, Drapery & Upholstery Stores

In 1979, there were 4,090 curtain, drapery and upholstery stores with payrolls operating in the U.S. down from 4,130 in 1978 but more than the 3,867 stores in operation during 1977, according to the U.S. Bureau of the Census. Sales of these establishments in 1977 amounted to $611.7 million, the last year for which sales figures are available.

There were also 6,194 curtain, drapery and upholstery stores in operation during 1977 without payrolls. These stores accounted for an additional $105.5 million in sales. In total, the 10,061 curtain, drapery and upholstery stores in operation during 1977 combined for $717.2 million in sales.

Distribution of Curtain, Drapery & Upholstery Stores
By Sales Volume, 1977

	Stores		Sales	
	No.	%	Mil. $	%
Total stores in operation the entire year	10,061	100.0%	$ 717.2	100.0%
Annual sales:				
$1.0 million & over	24	0.2	37.6	5.2
$500,000-999,000	168	1.7	108.8	15.2
$100,000-499,000	1,862	18.5	385.8	53.8
Under $100,000	8,007	79.6	185.0	25.8

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade, 1977,
Establishment & Firm Size, RC77-S-1.

Leading Stores

The 4 leading sellers of home textiles--Sears, J.C. Penney, K mart & Ward--accounted for approximately 32% of the estimated $10.3 billion (at retail) home textiles market in 1981, according to an HFD Textiles Report market analysis.

Home textiles sales in Mervyn's, a California department store chain, contributed 14.5% of total sales of the chain, the highest percentage of any of the leading stores.

RETAIL SALES BY TYPE OF OUTLET

Leading Stores

The Top 25 Stores in Home Textiles Sales, 1981

Rank	Store	Home Textiles Sales (Mil. $)	% of Home Textiles to Total Store Sales
1	Sears, Roebuck & Co.	$ 1,272	6.3%
2	J.C. Penney	1,055	6.7
3	K mart	934	5.7
4	Montgomery Ward	428	7.5
5	Woolworth/Woolco	340	7.4
6	TG & Y	240	12.0
7	Mervyn's	154	14.5
8	Wal-Mart	152	6.2
9	Target	110	5.4
10	Macy's New York	73	8.3
11	Bamberger's	64	8.0
12	Bloomingdale's	63	10.1
13	Belk Stores	56	4.4
14	Fred Meyer	54	5.2
15	The Broadway	53	7.0
16	Fed Mart	48	6.8
17	Bullock's	43	8.3
18	Venture	43	7.0
19	The Bon	42	11.0
20	Dillard's	41	6.8
21	Marshall Field	41	6.8
22	The May Co.,-L.A.	39	6.5
23	Macy's California	39	6.4
24	Ames Dept. Store	38	10.1
25	Burdine's	38	7.6

Source: HFD Textiles Report, May 17, 1982.

CONSUMER PRICE TRENDS

Retail prices for household linens and curtains, drapes and slipcovers rose more slowly than the overall consumer price index in 1981.

CONSUMER PRICE TRENDS

Consumer Price Indexes for Specified Home Textiles, 1979-1981 & January-July 1982

(Dec. 1977=100 unless otherwise indicated)

	January-July	Annual Averages			% Change
	1982	1981	1980	1979	1981/1980
All items (1967=100)	286.2	272.4	246.8	217.4	+ 10.4%
Textile homefurnishings (1967=100)	217.5	203.0	188.7	173.9	+ 7.6
Household linens	133.0	126.2	115.4	105.7	+ 9.4
Curtains, drapes, slipcovers & sewing materials	138.3	130.9	120.0	103.8	+ 9.1

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following information on consumer purchases of home textiles has been developed in the National Panel Diary (NPD) Business Index. This index tracks consumer purchases based on the buying patterns of a panel of 6,500 nationally-representative families reporting to NPD.

In 1981, home textiles purchases made by panel members rose 3.7% in dollars and 2.4% in units compared with the previous year. The most recent information available from NPD showed that purchases were up 6.9% in dollars for the 12-month period ended June 1982 versus the similar period ended June 1981, while unit purchases increased only 1.3%. However, the average price of home textiles bought from July 1981 through June 1982 was 5.5% higher than in the previous 12-month period.

Percent Change in Unit & Dollar Purchases of Specified Home Textiles

	% Change: 1981/1980			% Change: July 1981-June 1982/ July 1980-June 1981		
	Units	Dollars	Average Price	Units	Dollars	Average Price
Total, all categories	+ 2.4%	+ 3.7%	+ 1.3%	+ 1.3%	+ 6.9%	+ 5.5%
Sheets & pillowcases	--	+ 9.6	+ 9.6	- 0.9	+10.2	+11.3
All bathroom towels	+ 8.2	+ 6.5	- 1.2	+ 5.8	+13.7	+ 7.5
Bath towels	+ 6.8	+ 8.8	+ 1.9	+ 7.5	+15.5	+ 7.4
Blankets	-18.7	-13.7	+ 6.1	-14.3	- 6.2	+ 9.5
Bedspreads	- 4.9	+ 1.4	+ 6.6	- 6.1	- 2.2	+ 4.1
Comforters	- 7.7	-14.2	- 7.0	+ 4.6	+ 6.4	+ 1.7
Pillows	- 2.6	+ 7.0	+ 9.9	- 1.8	+ 1.6	+ 3.4

Source: Home Fashions Textiles
April 1982, October 1982

CONSUMER BUYING HABITS

A survey which appeared in the June 1982 issue of Home Fashions Textiles of 50 department and discount stores, with a total of 1,500 outlets around the U.S., found that separate bath shops are becoming the norm in both store types. All the surveyed mass merchants who added bath shops in the two years prior to the survey said sales increased, by an average of 27% for the group.

Solid color bath towels were the overwhelming choice as the bestselling towel category in discount stores, as it was in more than half of the department stores surveyed.

Best Selling Towel Categories
(Percent of Respondents)

	Department Stores	Discount Stores
Solid bath towels	58%	81%
Piped towels	25	9
Bath sheets	8	5
Print-jacquard bath towels	3	5
Embellished towels	3	--
Fingertips	3	--

From a demographically representative Consumer Panel of Better Homes & Gardens magazine subscribers, the publication extracted information from 442 women (out of 500 women on the panel) about their sheet purchases. Over half of the women (57.9%) reported that the color of the sheet is the first thing that attracts them, while an additional 38.2% said the pattern of the sheet is the prime attraction. Prior to their sheet purchase, nearly 9 out of 10 women surveyed felt it is helpful to know the type of fabric the sheet is made of.

"Which of the following do you find helpful to know when purchasing sheets?"

	% of Respondents*
Fabric type	88.7%
Fiber content	52.9
Thread count	43.4
None of these	2.3
No answer	1.8

* Percentages do not add to 100% due to multiple responses.

Sheets are most often coordinated with the color of their bedcovering (comforter or bedspread), according to 43.2% of the BH&G survey respondents.

CONSUMER BUYING HABITS

"What is the item you color coordinate your sheets to most often?"

	% of Respondents*
Bedcovering (comforter or bedspread)	43.2%
Wall color	29.9
Floor covering	14.0
Furniture or upholstery color	3.4
No answer	0.7

* Percentages do not add to 100% due to multiple responses.

In another questionnaire mailed to the BH&G Consumer Panel members in August 1980, 34.6% of the 445 respondents indicated they had purchased drapery hardware and/or traverse rods in the 12 months before the survey took place.

"Which of the following have you purchased in the past 12 months?"

	% of Respondents*
Drapery hardware and/or traverse rods	34.6%
Woven wood shade	8.1
Horizontal mini-blinds	5.4
Have not purchased any of the above	56.0
No answer	2.2

* Percentages do not add to 100% due to multiple responses.

More than two-thirds of the respondents (68.7%) believe that standard traverse draperies provide a good-to-excellent degree of energy savings.

"For each window treatment listed below, indicate the degree of energy savings you believe it provides"

	Degree of Energy Savings				
	Excellent	Good	Fair	Poor	No Answer
Standard traverse draperies	22.2%	46.8%	25.4%	2.7%	2.9%
Vertical blinds	3.8	35.5	43.6	10.1	7.0
Horizontal mini-blinds	4.9	30.3	41.3	14.4	9.1
Woven wood shades	9.0	38.9	35.7	8.3	8.1
Conventional shades	6.3	34.4	39.3	13.9	6.1

A recent Home Fashions Textile survey (HFT September 1982) taken among 44 department and discount stores nationwide, representing 3,000 outlets, asked about their current merchandising trends in the decorative and accessory pillow market for the first six months of 1982. According to the HFD Textiles Report, 43% of the business is done in department stores and 28% in discount stores.

CONSUMER BUYING HABITS

The following table shows the breakdown of decorative and accessory pillow purchases in the surveyed stores during the January to June 1982 period.

Percent of Purchases of Decorative & Accessory Pillows by Category
(Percent of Units Sold)

	Department Stores	Discount Stores
Total decorative & accessory pillow purchases	100.0%	100.0%
Decorative pillows	72.0	48.5
Bed rests	10.0	12.5
Floor pillows	7.0	8.0
Chair pads	6.0	24.0
Rocker pads	5.0	7.0

Forty percent of the discount store respondents regard corduroy as the favored fabric for decorative pillows purchased at their stores, compared with 16% of department store respondents. A majority of them (60%) named chintz as the leading fabrication.

Top Decorative & Accessory Pillow Fabrication
(Percent of Respondents)

	Department Stores	Discount Stores
Total respondents	100%	100%
Chintz	60	20
Corduroy	16	40
Velvet	8	15
Eyelet	4	10
Haitian cotton	4	5
Velveteen	4	5
Cotton duck	4	0
Satin	0	5

In another Home Fashions Textiles survey, on bedspreads (HFT September 1981), 48 department and discount store retailers across the country were asked about the bedroom ensembles they carried in the fall 1981 season as well as their thoughts on the fall 1982 season.

Almost eight out of 10 department store respondents, but only two out of 10 discount store respondents, plan to trade up in the price and quality of bedroom ensembles they will offer in the 1982 fall season.

Asked about their best-selling styles, 92% of all respondents said throws were more popular than fitted bedspreads while 81% agreed that quilted styles sell better than unquilted styles.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in December, 1982): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (1981 Edition available now -- 1982 Edition will be available in December 1982): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.45

Department Store Sales
1982

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

INTRODUCTION.. 1

SUMMARY OF AVAILABLE SALES FIGURES FOR
DEPARTMENT STORES, 1981 (BY REGION).................... 2

DEPARTMENT STORE VOLUME LEADERS
  STORES WITH SALES OF $100 MILLION & OVER............... 34
  STORES WITH SALES OF $50-TO-$99 MILLION................ 38

SALES FIGURES FOR MAJOR NATIONAL/REGIONAL CHAINS......... 40

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES
OPERATED BY CONGLOMERATE CORPORATIONS.................. 43

SCHEDULE OF ADDITIONAL FACT FILES........................ 48

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intented to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding or because sales for each store included in the totals were not available.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-426-0

Printed in the United States of America

DEPARTMENT STORE SALES

INTRODUCTION

This report summarizes the sales and number of stores operated in the year 1981 for traditional department store organizations (as well as a limited number of specialty stores), listed by buying headquarter location. Branch store locations are included where sales estimates are available.

Stores are listed by state and city within the four major geographic regions: Northeast, North Central, South and West. Listings of stores, store groups or divisions with a volume of $50 million or more and of chain and conglomerate organizations are also included in this report.

The sales figures are reported by the stores or are estimates believed to be reasonably accurate. Sources include the editorial staffs of Women's Wear Daily and other Fairchild trade papers, Dun and Bradstreet and other trade sources.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having sales of apparel and soft goods combined amounting to 20 percent or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radio and TV sets
2. A general line of apparel for the family
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

> NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, are available. The sales estimates reported may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Fairchild Market Research Division
Audrey S. Balchen, Director

SUMMARY OF AVAILABLE SALES FIGURES FOR DEPARTMENT STORES, 1981 * BY REGION

NORTHEAST	Approx. Sales (Millions of $)
CONNECTICUT	
Bridgeport	
D. M. Read Inc. (Allied Stores, New York, N.Y.) (5 Conn. stores)	$ 75.0
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I. 1)	170.0
Sage-Allen & Co. (13 stores in Conn.)	53.0
Norwalk	
Caldor (Acquired by Associated Dry Goods, New York, N.Y. in May 1981) (65 stores) (Will take over 5 Stewart & Co. Baltimore stores in 1983)	778.0
MAINE	
Brunswick	
W. F. Senter Co. (1 store)	2.7
Freeport	
L. L. Bean (Mail order business plus 1 store with sales estimated at over $20 million)	121.0
Portland	
Porteous Mitchell & Braun (4 stores plus Downeast Shops specialty store division)	25.0
MASSACHUSETTS	
Boston Area	
Filene's (Federated Dept. Stores, Cincinnati, Ohio) (12 department stores: Mass. 10, N.H. 1, R.I. 1; 5 Basement Stores: Mass. 4, N.H. 1.)	321.6
(4 Basement stores were opened in the New York Metropolitan Area in 1982, as well as 1 in Methuen, Mass.)	
Harvard Coop., Cambridge (6 stores, including 5 on major campuses in Boston and Cambridge, 1 in downtown Boston)	40.0+
Jordan Marsh (Allied Stores, New York, N.Y.) (14 stores: Mass. 11, Me. 1, N.H. 1, R.I. 1)	416.0
(Fox Hill Run store opened in Spring 1982; Crystal Mall, Waterford, Conn. store to open July 1984.)	
The Talbot's, Hingham, Mass. (Catalog headquarters; also 16 stores)	75.0+
Pittsfield	
England Bros. (3 stores in Mass.)	10.0

---

* A limited number of apparel specialty stores for which sales figures are available are included in this report. Reported sales are for the year 1981, or closest fiscal period, reflecting published figures or best available trade estimates.

DEPARTMENT STORE SALES	Approx. Sales (Millions of $)
NORTHEAST	
MASSACHUSETTS	
Springfield	
Albert Steiger Inc. (9 stores in Mass.)	$ 50.0
Waltham	
Grover Cronin Inc. (1 store)	11.0
NEW JERSEY	
Burlington	
Burlington Coat Co. (2 specialty stores)	30.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) (23 stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2; also 3 Furniture Clearance Centers, 7 Auto Centers)	800.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 N.J. stores)	100.0
Ocean City	
Howard S. Stainton Co. (1 store)	7.0
Paramus	
Stern Bros. (Allied Stores, New York, N.Y.) (7 N.J. stores) (Merchandising operations merged with Gertz's in Aug. 1982)	124.0
Paterson	
Meyer Brothers (2 N.J. stores)	4.0+
NEW YORK	
Binghamton	
Fowler, Dick & Walker (L.S. Good & Co., Wheeling, W.Va.) (2 N.Y. stores)	10.0
Buffalo	
Adam, Meldrum & Anderson (9 N.Y. stores) (A branch in former Hens & Kelly Bldg., Northtown Plaza, Buffalo, was opened in August 1982)	80.0
William Hengerer (Associated Dry Goods, New York, N.Y.) (5 stores merged with Sibley, Lindsay & Curr Div. in August 1981. Name changed to Sibley's)	30.0
Hens & Kelly (Twin Fair, Inc.) (8 N.Y. stores) (4 stores closed in 1981, including downtown Buffalo, Northtown Plaza, Transition Plaza and Aurora Village Shopping Center)	20.0
The Sample Inc. (12 N.Y. stores)	21.0
Elmira	
S.F. Iszard & Co. (2 N.Y. stores)	8.0
Endicott	
Burt Co. (2 N.Y. stores)	4.0

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK

	Approx. Sales (Millions of $)
Glens Falls	
Economy Dry Goods (2 N.Y. stores)	$ 19.0
Jamestown	
Abrahamson & Bigelow (1 department store, 2 specialty stores)	3.5
Liberty	
Sullivan's (2 N.Y. stores)	16.0
New York City Area (Also see NEW JERSEY listings)	
Abraham & Straus (Federated Dept. Stores, Cincinnati, Ohio) (14 stores: N.Y. 9, N.J. 4, Pa. 1)	605.0
Fulton St., Brooklyn (store to be reduced in size)	128.0
Hempstead	40.0
Huntington	54.0
King of Prussia, Pa. (opened Aug. 1981) Expected annual rate:	22.0
Manhasset	59.0
Monmouth Mall, Eatontown, N.J.	63.0
Paramus Park, N.J.	32.0
Short Hills, N.J. (opened March 1981) Expected annual rate:	22.0
Woodbridge, N.J.	43.0
(Store in Willow Grove, Pa. opened Oct. 1982)	
Alexander's (Alexander's Dept. Store Inc., New York, N.Y.) (16 stores: Conn. 1, N.J. 3, N.Y. 12)	523.6
(Sold specialty store div., Margo's La Mode July 1981 to Elder Beerman)	
B. Altman & Co. (The Altman Foundation, New York, N.Y.) (6 stores: N.Y. 3, N.J. 2, Pa. 1)	295.0
Fifth Avenue	145.0
Manhasset	30.0
Paramus, N.J.	39.0
St. Davids, Pa.	17.0
Short Hills, N.J.	26.0
White Plains	37.0
(Willow Grove Park, Pa. store opened Aug. 1982. Expected annual rate: $20 million)	
Ann Taylor (Allied Stores, New York, N.Y.) (38 stores)	35 to 40
Barney's (1 specialty store)	50.0
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Calif.) (1 store)	73.0
Bloomingdale's (Federated Dept. Stores, Cincinnati, Ohio) (11 full-line department stores: N.Y. 4, N.J. 2, Va. 1, Md. 1, Pa. 1, Conn. 1, Mass. 1; 5 homefurnishings stores: N.Y. 3, Pa. 1, Mass. 1)	647.4
New York Area stores	485.5
59th Street (to be enlarged)	259.0
Fresh Meadows	20.0
Garden City	37.0
Manhasset (homefurnishings store, converted in 1982 to a Filene's Basement Store)	10.0
Scarsdale (homefurnishings store, to be closed)	2.5

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST

NEW YORK	Approx. Sales (Millions of $)
New York City Area (continued)	
Bloomingdale's (continued)	
New Rochelle (homefurnishings store)	$ 1.0
White Plains	40.0
Riverside Sq., Hackensack, N.J. (Bergen County)	49.0
Short Hills, N.J.	35.0
Stamford, Conn.	31.0
Outside of New York Area	163.0
Jenkintown, Pa. (closed July 1982)	11.0
King of Prussia, Pa. (opened August 1981)	18.0
White Flint Mall, Md. and Tyson's Corner, Va.	60 to 65
(Bloomingdale's opened a store in Willow Grove Park, Philadelphia in August 1982 which is expected to have a 1st year annual volume of $30 million. A Dade County, Fla. store is to be opened in Spring 1984; Valley View Mall, Dallas store in Oct. 1983.)	
Bonwit Teller (Allied Stores, New York, N.Y.) (13 stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Fla. 2, Calif. 1)	90.0
New York Area	
Fifth Avenue (opened April 1981)	16.0
Manhasset	10.0
Scarsdale	7.5
Short Hills, N.J.	6.5
Outside of New York Area	40.0
(A Palm Desert, Palm Springs, Calif. store is to be opened in 1983)	
Brooks Bros. (Allied Stores, New York, N.Y.) (28 stores incl. 5 in Japan)	165.0
Gimbels-New York (Batus Inc., New York, N.Y.) (10 stores: N.Y. 7, Conn. 2, N.J. 1)	270.0
Herald Square	100.0
86th Street	46.0
Lord & Taylor (Associated Dry Goods, New York, N.Y.) (37 stores: N.Y. 5, Conn. 2, Mass. 3, Md. 1, N.J. 2, Pa. 2, Va. 3, D.C. 1, Fla. 1, Ga. 1, Ill. 7, Mich. 3, Tex. 6)	528.0
New York Area (8 stores plus Clearance Center)	181.0
Fifth Avenue	78.0
Garden City	14.0
Westchester	20.0
Huntington Clearance Center	2.0
Manhasset	12.0
Milburn, N.J.	12.0
Paramus Park, N.J.	14.0
West Hartford, Conn.	11.0
Stamford, Conn.	18.0
Available sales estimates for branch stores in other areas:	
South:	
Washington, D.C. Area (4 stores)	75.0
Fair Oaks, Va. opened Feb. 1981. Expected annual vol:	10.0

(New York City Area continued)

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
NEW YORK	
New York City Area (continued)	
Lord & Taylor (continued)	
Dallas, Tex. Area	$ 27.0
NorthPark	15.0
Prestonwood Town Center	10.0
Collin Creek Mall, Plano (opened Oct. 1981)	2.0
Houston, Tex. Area	39.0
Galleria	20.0
Greenspoint Mall	8.0
Memorial City	11.0
(Lord & Taylor opened its 2nd Fla. store, in Cutler Ridge Mall, Miami, Jan. 1982. Expected annual rate the 1st year: $10 million. Plans for 1983 openings include: Aventura Mall, Miami--Feb.; West Hartford, Conn.--April; Galleria, Ft. Lauderdale--Oct.)	
Macy's New York (R.H. Macy, New York, N.Y.) (15 stores: N.Y. 14, Conn. 1, plus 4 Furniture Clearance Centers and 8 Auto Centers)	875.0
Herald Square	280.0+
(A Stamford, Conn. store was opened Feb. 1982. In Fall 1983 a store in Aventura Mall, Dade County, Fla. will open; in 1984 2 stores in Houston)	
Mays (J.W. Mays Inc., Brooklyn, N.Y. (11 stores of which 5 were closed in 1982)	189.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (32 stores: N.Y. 4, N.J. 1, Pa. 2, Md. 1, N.H. 1, Mass. 1, Mich. 2, Ohio 1, Ill. 3, Ga. 1, Fla. 3, Tex. 1, Ariz. 1, Calif. 8, Mo. 1, Nev. 1)	712.9
Fifth Avenue Store	180.0
Other Eastern Stores, including Boston, Mass.; Springfield, N.H.; White Plains, N.Y.; Garden City, N.Y.; Hackensack (Bergen County), N.J.; Chevy Chase, Md.; Bala Cynwyd, Pa.)	140.0
North Central:	
Plaza Frontenac, St. Louis, Mo.	20.0
Chicago: Michigan Avenue	26.0
Old Orchard	14.0
(Country Club Plaza, Kansas City, Mo., opened Aug. 1982. Expected volume 1st year: $13 million)	
West:	
Los Angeles Area (5 stores)	72.0
San Francisco Area (3 stores incl. Union Sq. opened Aug. 1982)	35.0+
Las Vegas	8.0
South:	
Houston	26.5
Stern's, Bergen Mall, Paramus, N.J. (Allied Stores, New York, N.Y.) (7 N.J. stores. Merchandising operations of Gertz, Inc., Plainview, N.Y. combined with Stern's in 1982)	124.0
Patchogue	
Swezey & Newins (2 stores)	14.0
Plainview	
B. Gertz Inc. (Allied Stores, New York, N.Y.) (9 stores. Merchandising operations merged with Stern's in 1982)	90.0

DEPARTMENT STORE SALES

NORTHEAST

	Approx. Sales (Millions of $)
NEW YORK	
Rochester	
McCurdy & Co. (6 stores)	$ 80.0
Sibley's (Associated Dry Goods, New York, N.Y.) (14 stores including 5 former William Hengerer, Buffalo, stores which were merged with Sibley's in August 1981) (A store in Marketplace Mall, Rochester, opened Oct. 1982)	155.0
B. Forman & Co. (5 stores)	20.0+
Schenectady	
The Carl Co. (5 stores) (Negotiating with United Dept. Stores to buy 2 Denby stores--Troy and Albany)	9.0
Seaford	
Mid-Island Dept. Stores (6 L.I., New York stores)	24.0
Syracuse	
The Addis Co. (4 stores)	9.0
Chappell's Dept. Store, (Northern Light Shopping Center) (6 stores)	19.0
Dey Brothers (Allied Stores, New York, N.Y.) (4 stores)	38.0
White Plains	
Howland Steinbach (28 stores) (Not including Hochschild Kohn)	145.0
PENNSYLVANIA	
Allentown	
Hess's (Crown American Corp.) (24 stores: Pa. 20, Md. 1, N.Y. 3) (Chambersburg, Pa. store opened in Feb. 1982. Hess's acquired Penn Traffic Co.'s 6 dept. stores and 2 women's specialty stores in Western Pa. in Feb. 1982, adding $30 million in sales volume)	211.0
H. Leh & Co. (3 stores)	15.0
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (4 stores: Del. 3, N.J. 1)	60.0
Greensburg	
Troutman's (Allied Stores, New York, N.Y.) (8 Pa. stores)	42.0
Harrisburg	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (6 Pa. stores)	55.0
Hazelton	
P. Deisroth's Sons (2 Pa. stores)	5.0
Johnstown	
Glosser Bros. (1 store plus Gee Bee Discount Stores)	150.0
Penn Traffic Co. (6 department stores, 2 specialty stores. Purchased by Hess's, Allentown, Feb. 1982)	29.5

DEPARTMENT STORE SALES

NORTHEAST	Approx. Sales (Millions of $)
PENNSYLVANIA	
Lancaster	
Watt & Shand (2 Pa. stores)	$ 25.0
Levittown	
Pomeroy's Inc. (Allied Stores, New York, N.Y.) (8 stores: Pa. 6, N.J. 1, Del. 1)	70.0+
Philadelphia Area	
Altman's, St. Davids (B. Altman, New York, N.Y.)	17.0
(Willow Grove Park store opened Aug. 1982. Expected 1st year volume: $20 million)	
Bloomingdale's (Bloomingdale's, New York, N.Y.)	
Jenkintown (closed July 1982)	11.0
King of Prussia (opened Aug. 1981)	18.0
(Willow Grove Park store opened Aug. 1982. Expected 1st year volume: $30 million)	
Gimbels-Philadelphia (Batus Inc., New York, N.Y.) (10 stores: Pa. 8, N.J. 2)	170.0
Strawbridge & Clothier (11 department stores plus Clover Stores)	425.6
Department stores (11 stores: Pa. 8; N.J. 2; Del. 1)	275.0
John Wanamaker (Carter Hawley Hale, Los Angeles, Calif.) 16 stores: Pa. 11, N.J. 2, N.Y. 2, Del. 1).	335.0
Downtown Philadelphia	73.0
(A Harrisburg, Pa. store was opened in July 1982)	
(The Willow Grove Park Mall was opened in August 1982. It includes a B. Altman and a Bloomingdale's store. Combined 1st year volume of these 2 stores estimated at $50 million. Abraham & Straus opened in the Mall in Oct. 1982--A & S's second Philadelphia area store)	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. stores)	150.0+
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 stores: Pa. 11, Ohio 2, plus 2 Boston Stores in Pa.)	160.0
Kaufmann's Department Stores (May Dept. Stores Co., St. Louis, Mo.) (10 stores: Pa. 7, Ohio 2, Ill. 1)	287.0
Reading	
Boscov's Dept. Stores (8 Pa. stores)	150.0
Scranton	
Cleland-Simpson Co. (John Wanamaker, Philadelphia, Pa.) (1 store)	20.0
Oppenheim's Scranton Dry Goods (1 store)	20.0
Uniontown	
Metzler's Dept. Store (2 Pa. stores)	4.0
York	
S. Grumbacher & Sons (14 stores under various names)	50.0
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington Inc. (3 stores in Ill.)	5.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
ILLINOIS	
Champaign	
Robeson's Inc. (1 store)	$ 7.0
Chicago Area	
Carson Pirie Scott & Co. (24 stores in Department Store Division operating in Ill. and Ind.)	311.1
(25th store opened in Oct. 1982 at River Oaks, Calumet City, Ill.)	
Crawford Department Stores (4 stores in Ill.)	11.0
Evans Inc. (specialty stores and leased depts. in Ill., Ind., S.C., D.C., Va., Md.)	80.0
Madigan Bros., River Forest (8 specialty stores)	30.0
Marshall Field (Marshall Field & Co., acquired by Batus Inc. in 1982) (19 stores: Ill. 17, Wis. 1, Tex. 1)	610.0
Chicago Div.	
Houston	24.0
(Galleria, Dallas, Tex. store opened in Oct. 1982. Expected volume 1st year: $12-$15 million)	
Montgomery Ward-Chicago area stores	280.0+
State Street (To be closed at end of 1983)	30.0
Neiman Marcus (Neiman Marcus, Dallas, Texas) (2 stores)	30.0
J.C. Penney (30 area stores)	400.0
The People's Store of Roseland (2 stores)	12.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (2 stores)	30.0
Sears Roebuck Chicago area stores	800.0
State Street (To be closed in 1983)	30.0
Spurgeon Mercantile Corp. (78 stores in Ill., Ind., Ia., Mich., Minn., Wis.)	50.0+
Wieboldt Stores Inc. (15 Chicago area stores)	177.9
Elgin	
Ackemann Bros. (Ill. stores)	6.0
Joseph C. Spiess Co. (3 Ill. stores)	16.0
Granite City	
The Glik Co. (13 Ill. stores)	5.5
Peoria	
P.A. Bergner & Co., Peoria, Ill. (Also operates Myers Bros., Springfield, Ill.)	185.0
(The 16-store Bergner Division was merged with 10-store Bergner-Weise Div., Peoria, in Feb. 1982)	
Szold's, Inc. (2 stores incl. Walton's, Fairbury, Ill.)	12.0
Rock Island	
McCabe's (1 store)	5.0
Rockford	
Bergner Weise Co. (P.A. Bergner Co., Peoria) (10 stores: Ill. 7, Wis. 3)	60.0

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
ILLINOIS	
Springfield	
Stix, Baer & Fuller (Stix, Baer & Fuller, St. Louis, Mo.) White Oaks Mall store (To be taken over by Kohl's Dept. Stores, Milwaukee)	$ 4.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 Ind. stores)	5.0
Evansville	
The Evansville Store, Lawndale Shopping Center (Interstate Stores, Latham, N.Y.) (1 store)	6.5
Hammond	
Edward C. Minas Co. (3 Ind. stores)	8.0
Indianapolis	
L. S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (12 stores)	186.0
William H. Block Co. (Allied Stores, N.Y.) (9 Indiana stores)	88.0
Sycamore Specialty Stores (Associated Dry Goods Corp., New York, N.Y.) (50 stores)	13.0
Muncie	
Ball Stores (3 stores in Ind. Also operates Ball Stores Collegienne Shops)	12.0
IOWA	
Cedar Rapids	
Armstrong Inc. (1 store)	23.0
Killian Co. (3 Iowa stores)	13.0
Davenport	
Petersen-Harned-Von Maur Inc. (7 stores: Ia. 5, Ill. 2)	25.0
Des Moines	
Younker's Dept. Store (Equitable of Iowa Companies, Des Moines, Ia.) (29 stores)	165.0
MICHIGAN	
Detroit Area	
Crowley, Milner & Co. (10 stores)	73.2
Hudson's (Dayton Hudson Corp., Minneapolis, Minn.) (19 stores: Mich. 16, Ohio 1, Ind. 2)	658.1
Downtown Detroit (to be closed at end of 1982)	40.0
(Fort Wayne store opened July 1981; Lansing, Mich. store opened in 1982; Battle Creek, Mich. store to be opened in 1983)	
Winkelman Stores Inc. (88 stores: Mich. 58, Ohio 20, Ill. 10)	99.8

DEPARTMENT STORE SALES

NORTH CENTRAL	Approx. Sales (Millions of $)
MICHIGAN	
Grand Rapids	
Herp's Co. (Allied Stores, New York, N.Y.) (2 stores)	$ 15.0
Paul Steketee & Sons Co. (6 Mich. stores)	25.0
Jackson	
Jacobson Stores (16 dept. stores: Fla. 4, Mich. 11, Ohio 1. Also 7 hfgs. stores, 1 children's wear store)	169.3
Kalamazoo	
Gilmore Bros. (3 Mich. stores)	12.0
Lansing	
J. W. Knapp (L.S. Good & Co., Wheeling, W.Va.) (8 Mich. stores)	30.0+
Saginaw	
W. C. Wiechmann Co. (2 Mich. stores)	7.5
Traverse City	
J. W. Milliken (3 Mich. stores)	5.0
MINNESOTA	
Duluth	
Duluth Glass Block Stores (Mercantile Stores, New York, N.Y.) (2 stores in Duluth; also O. J. De Lendrecie Co., 1 store in Fargo, N.D.)	23.0
Wahl's Dept. store (1 store)	4.0
Mankato	
Bretts Dept. Store (4 stores)	10.0
Minneapolis	
Dayton's (Dayton Hudson, Minneapolis, Minn.) (13 stores: Minn. 9, N.D. 2, S.D. 1, Wis. 1)	410.1
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	107.0
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. stores)	43.0
Salkin & Linoff (100+ specialty stores)	70.0
St. Cloud	
Fandel (2 dept. stores in Minn. and 2 Intrigue Specialty Stores)	5.0+
G.R. Herberger's Inc. (21 stores: Minn. 7, Mont. 3, N.D. 3 S.D. 5, Wis. 2, Wyo. 1)	45.0+
MISSOURI	
Joplin	
Newman's (5 stores: Mo. 3, Okla. 1, Kans. 1)	18.0

DEPARTMENT STORE SALES

NORTH CENTRAL

MISSOURI

Kansas City

	Approx. Sales (Millions of $)
Hall's Dept. Store (Hallmark Cards, Kansas City, Mo.) (2 Mo. stores)	$ 21.0
Harzfeld's (Allied Stores, New York, N.Y.) (8 stores: Kans. 2, Mo. 4, Okla. 2)	30.0
The Plaza, Kansas City	10.0
The Jones Co. (Mercantile Stores, New York, N.Y.) (7 Mo. stores)	125.0
Macy's Midwest (R. H. Macy, New York, N.Y.) (21 stores: Kans. 5, Mo. 8, Ohio 8 former LaSalle stores)	186.0
The Plaza, Kansas City	10.0
Stix, Baer & Fuller (Stix, Baer & Fuller, St. Louis, Mo.) (3 stores)	27.0
Independence	5.5
Oak Park	8.0
Ward Parkway	13.5
Swanson's (Hallmark Cards, Kansas City, Mo.) (1 store)	9.5
Woolf Bros. (8 stores: Mo. 4, Kans. 1, Tex. 2, Tenn. 1)	33.0
The Plaza, Kansas City	7.0
(Saks Fifth Ave. opened a store in Aug. 1982 in Country Club Plaza. Expected volume 1st full year: $13 mil.)	

St. Louis

	Approx. Sales (Millions of $)
Famous Barr (May Department Stores, St. Louis, Mo.) (14 stores incl. 11 department stores, 1 specialty store in metro St. Louis, 1 department store in Springfield, Ill. and 1 in Cape Girardeau, Mo.)	328.0
Metropolitan St. Louis (12 stores)	304.0
Downtown	53.0+
Alton Square	13.5
Cape Girardeau, Mo. (opened in Mar. 1981)	9.5
Clayton	27.5
Crestwood	15.0
Northland	26.0+
Northwest Plaza	36.0
St. Clair Square	34.0
St. Peters (opened Aug. 1981)	7.0
South County	27.0+
Southtown	22.0
Springfield, Ill.	14.5
(Battle Field Mall, Springfield store opened in 1982)	
FB, Ltd. (specialty store)	6.0-
Grandpa Pidgeon's (5 stores)	50.0+
K mart (22 stores)	160 to 165
Neiman Marcus (Neiman Marcus, Inc., Dallas, Tex.) (1 store in Plaza Frontenac)	15.0+
J.C. Penney (6 full-line stores, 6 soft goods stores)	125.0
South County	33.0
Saks Fifth Ave. (Saks Fifth Ave., New York, N.Y.) (1 store in Plaza Frontenac)	20.0
Sears Roebuck (7 full-line stores, 3 catalog-appliance outlets)	155.0
Northwest Plaza	40.0

(St. Louis Area continued)

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
MISSOURI	
St. Louis (continued)	
Stix, Baer & Fuller (Associated Dry Goods, New York, N.Y.) (13 stores: Ill. 2, Kans. 1, Mo. 10)	$ 141.0
Downtown	12.0
Chesterfield	16.5
Crestwood	13.0
Jamestown	9.5
Kansas City (3)	27.0
Northwest Plaza	12.5
St. Clair Square	10.0
South County	8.0
Springfield, Ill. (White Oaks Mall) (To be taken over by Kohl's Dept. Stores, Milwaukee)	4.0
Westroads (Division headquarters have re-located here, moving from downtown location)	20.5
Target (Dayton Hudson Corp., Minneapolis, Minn.) (10 stores)	135.0
Venture Stores (May Department Stores, St. Louis, Mo.) (12 stores)	120.0
Wal-Mart (Wal-Mart Stores, Bentonville, Ark.) (10 stores)	70.0
NEBRASKA	
Fremont	
Geo. Schweser's & Sons (8 stores)	9.0
Hastings	
J. M. McDonald Co. (57 specialty stores in North Central & West)	70.0+
Lincoln	
Miller & Paine Inc. (3 Neb. stores)	10.0+
Omaha	
J. L. Brandeis & Sons (10 stores: Ia. 2, Neb. 8)	80.0
Philips Stores (7 stores: Ia. 2, Neb. 5)	11.0
NORTH DAKOTA	
Bismarck	
A. W. Lucas (1 store)	5.0
Fargo	
Herbst Inc. (3 N.D. stores)	5.0
O. J. de Lendrecie Co. (Duluth Glass Block Stores, Duluth, Minn.)	4.0
OHIO	
Akron	
The M. O'Neil Co. (May Dept. Stores, St. Louis, Mo.) (10 Ohio stores)	126.0
Ashtabula	
Carlisle-Allen (11 stores: Ohio 6, Pa. 5)	45.0+

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
OHIO	
Bowling Green	
Fred W. Uhlman & Co. (11 Ohio dept. stores plus specialty stores in Ohio, Ind., Mich.)	$ 20.0
Cincinnati	
McAlpin Co. (Mercantile Stores, New York, N.Y.) (9 stores: Ohio 6, Ky. 3)	145.0
H. & S. Pogue Co. (Associated Dry Goods, New York, N.Y.) (5 Ohio stores)	63.0
Shillito's (Federated Dept. Stores, Cincinnati, Ohio) (9 stores: Ky. 4, Ohio 5) (Merged with Rike's, Dayton, Ohio in April 1982. Name changed to Shillito's/Rike's. Will operate 14 department stores (10 in Ohio -- Dayton, Cincinnati and Springfield) and 4 in Kentucky -- Lexington, Louisville and Florence)	221.1
Cleveland	
Halle's (acquired by Associated Investors Corp. from Marshall Field & Co., Chicago, Ill.) (16 stores of which all but 2 -- in Columbus -- were closed or sold in 1982)	90.0
Higbee's (May Department Stores, St. Louis, Mo.) (11 stores in Ohio)	206.3
The May Co. (May Dept. Stores, St. Louis, Mo.) (10 stores in Ohio)	222.0
Columbus	
F. & R. Lazarus (Federated Department Stores, Cincinnati, Ohio) (16 stores: Ohio 11, Ind. 4, W.Va. 1)	375.5
(2 former Halle units were re-opened by new owners as the Union Stores in Sept. 1982)	
Dayton	
Elder-Beerman Dept. Store Div. (Elder-Beerman Stores Corp.) (20 dept. stores)	190.0
Rike's (Federated Dept. Stores, Cincinnati, Ohio) (5 Ohio dept. stores plus 1 warehouse store) (Merged with Shillito's, Cincinnati, April 1982)	120.9
Jackson	
Stiffler Stores Inc. (16 stores)	4.0
Portsmouth	
Marting Bros. (2 stores)	7.0
Springfield	
Edward Wren Store (2 stores)	8.0
Toledo	
The Lion Dry Goods Co. (Mercantile Stores) (4 Ohio stores)	70.0

DEPARTMENT STORE SALES

NORTH CENTRAL

	Approx. Sales (Millions of $)
OHIO	
Wooster	
H. Freedlander Co. (1 store)	$ 5.0
Youngstown	
Strouss (May Dept. Stores, St. Louis, Mo.) (9 Ohio stores)	77.0
WISCONSIN	
Brookfield	
T. A. Chapman Co. (6 stores incl. 2 Manchester's specialty stores)	12.0+
Kohl's Department Stores (Batus Inc., New York, N.Y.) (14 Wis. stores)	87.1
Brookfield Square	10.0
Southridge	12.0
LaCrosse	
Wm. Doerflinger Co. (4 Wis. stores)	6.0
Marinette	
Lauerman Bros. Co. (4 Wis. stores)	5.5
Milwaukee (also see Brookfield)	
Boston Store (Federated Dept. Stores, Cincinnati, Ohio) (7 stores in Milwaukee area)	111.5
Gimbels-Midwest (Batus Inc., New York, N.Y.) (11 Wis. stores)	170.0
Milwaukee stores (8)	130.4
Mayfair	26.0
Southridge	25.0
Northridge	18.0
(2 stores were opened in 1981 -- in Racine and in Kenosha, and a replacement store in Capitol Court Mall. Grand Ave. Mall, Milwaukee store opened in 1982)	
Sheboygan	
H. C. Prange Co. (19 dept. stores: Ill. 2, Mich. 2, Wis. 15)	110.0
Wausau & Wisconsin Rapids	
Johnson Hills Dept. Stores (3 Wis. stores)	9.5

SOUTH

ALABAMA	
Birmingham	
Parisian Inc. (9 specialty stores in Ala.)	75.0
Pizitz, Inc. (12 stores in Ala.)	70.0
Florence	
Rogers Inc. (3 stores in Ala.)	5 to 10

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
ALABAMA	
Mobile	
C. J. Gayfer Co. (Mercantile Stores, New York, N.Y.) (12 stores: Ala. 3, Fla. 6, Miss. 3)	$ 130.0
Montgomery	
Gayfers (Mercantile Stores, New York, N.Y.) (6 stores)	50.0
ARKANSAS	
El Dorado	
J. A. West Co. (17 stores: in Ark., La., Mo., Okla., Tex. Also 4 Gibson's Department Stores)	24.0
Fayetteville	
Campbell-Bell Inc. (3 Ark. stores)	5.5
Fort Smith	
Boston Store (Boston Store Dry Goods Co., Fort Smith, Ark.) (2 Ark. stores)	10.0+
Hunt Dry Goods (9 stores: Ark. 6, Mo. 1, Okla. 1, Tex. 1)	10.5
Little Rock	
M. M. Cohn (8 specialty stores: Ark. 4, Tenn. 4. Acquired Clarke's Good Clothes, Tulsa, Okla., Dec. 1981)	35.0
Dillard Dept. Stores -- Little Rock Div. (Dillard Dept. Stores Inc., Little Rock, Ark.) (14 stores: Ark. 8, La. 3, Tenn. 1, Tex. 2)	178.0
(3 additional Memphis stores, formerly operated by Lowenstein's, were opened by Dillard in 1982. This is expected to bring the 40-store Memphis total annual volume to $45 to $50 million.)	
DELAWARE	
Wilmington	
Kennard's Dept. Stores (4 Del. stores)	5.0
DISTRICT OF COLUMBIA	
Washington Area (Including nearby Virginia and Maryland stores. Also see Baltimore, Md. listings.)	
Bloomingdale's (Bloomingdale's, New York, N.Y.) White Flint and Tyson's Corner, Va. (2 stores)	60 to 65
Garfinckel's (Allied Stores, New York, N.Y., Washington, D.C.) (8 specialty stores, 2 hotel shops)	80.0+
Hecht's (May Dept. Stores Co., St. Louis, Mo.) (22 stores: Md. 16, D.C. 1, Va. 5)	405.0
Washington, D.C. Div. (15 stores)	315.0
Baltimore, Md. Div. (7 stores)	90.0
(The Laurel, Md. store was replaced by a new store in 1981; 1st year volume expected to reach $18 to $20 million. A Bel Air, Md. store was opened Aug. 1981. Towson Plaza Mall store opened Fall 1982.)	

(Washington Area continued)

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
DISTRICT OF COLUMBIA	
Washington Area (continued)	
Neiman Marcus, Mazza Galleria, Chevy Chase (Neiman Marcus, Dallas, Texas)	$ 15.0
Raleigh's Stores (11 stores: D.C. 3, Va. 3, Md. 5)	60.0
Woodward & Lothrop (16 stores: D.C. 2, Md. 10, Va. 4)	334.8
Downtown (Washington, D.C.)	55.0
FLORIDA	
Bradenton	
Beall's Dept. Stores (26 stores in Florida)	40.0
Jacksonville	
Furchgott's Inc. (5 Fla. stores)	20.0
May-Cohens (May Dept. Stores, St. Louis, Mo.) (6 stores)	47.0
Miami-Palm Beach Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (21 Fla. stores)	565.5
Dadeland Shopping Center	100.0
(Mayfair Coconut Grove, Fla. store to open in Winter 1983)	
J. Byron's (Jack Eckerd Corp., Clearwater, Fla.) (39 Fla. stores)	148.9
Jordan Marsh Florida (Allied Stores, New York, N.Y.)(13 Fla. stores) (Miami International Mall Store opened August 1982)	210.0
(Lord Taylor opened a store at Cutler Ridge, Miami in June 1982. A Miami International Mall unit will be opened in 1983)	
Tallahassee	
William Henry Inc. (7 stores: Fla. 1, Ala. 3, Ga. 1, Ky. 2) (Also operates specialty stores in Ala. & Fla.)	7.5
Tampa-St. Petersburg Area	
Maas Bros. Tampa (Allied Stores, New York, N.Y.) (19 Fla. stores. Northgate Shopping Center store closed in 1982)	265.0
Robinson's of Florida, St. Petersburg (Associated Dry Goods, New York, N.Y.) (7 stores in Fla.) (South Orlando store to be opened in 1983)	65.0
Winter Park	
Ivey's Florida (Marshall Field, Chicago, Ill.) (10 Fla. stores)	75.0
GEORGIA	
Atlanta Area	
Davison's (R. H. Macy, New York, N.Y.) (12 stores: Ga. 11, S.C. 1) (Perimeter Mall store opened Sept. 1982. Gwinnett Place, Ga. store to open in Spring 1984.)	214.0
H. Kessler & Co. (6 Ga. stores plus wholesaling operation)	12.0
Muse's (George Muse Clothing Co.) (11 stores)	18.0
Atlanta area (7 stores)	15.0
Columbia, S.C. (4 Berry's-on-Main stores)	3.0

(Atlanta Area continued)

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
GEORGIA	
Atlanta Area (continued)	
Rich's (Federated Dept. Stores, Cincinnati, Ohio) (17 stores: Ga. 13, Ala. 2, S.C. 2)	$ 398.8
(Rich's also operated 21 Richway Discount stores with a volume of $266.2 million)	
Augusta	
J. B. White & Co. (Mercantile Stores, New York, N.Y.) (3 Ga. stores)	15.0+
Columbus	
J. A. Kirven (3 stores in Ga.)	8.0
Cordele	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.C.) (26 stores)	18.0
Savannah	
Allied Outlet Stores (60 stores in Ga. and S.C.)	30.0
Levy's of Savannah Inc. (Allied Stores) (1 store)	6.5
KENTUCKY	
Danville	
Hub Frankel Co. (1 store)	5.0
Louisville	
J. Bacon & Co. (Mercantile Stores) (5 stores)	30.0+
Ben Snyder Inc. (7 stores)	21.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 stores)	64.0
Owensboro	
S. W. Anderson Co. (2 stores)	7.0
LOUISIANA	
Alexandria	
Wellan's (2 stores)	7.8
Baton Rouge	
Goudchaux's Inc. (3 La. stores)	98.0
(Purchased 3 suburban Maison Blanche stores in 1982, which had a combined sales volume of $50 million)	
DeRidder	
West Bros Inc. (30 stores in Ala., Fla., La., Miss.)	60.0
Lake Charles	
Muller Co. Ltd. (Allied Stores, New York, N.Y.) (2 La. stores)	10.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
LOUISIANA	
New Orleans	
Leon Godchaux Clothing Co. (7 stores: La. 6, Miss. 1)	$ 35.0
D. H. Holmes Co. Ltd. (13 stores: La. 11, Miss. 1, Ala. 1)	221.0
Krauss Co. Ltd. (1 store)	20.0
Maison Blanche (City Stores, New York, N.Y.) (8 stores: La. 4, Tenn. 4)	60.0
(3 suburban stores with volume of $50 million sold to Goudchaux's, Baton Rouge in 1982)	
Ruston	
Lewis & Co. (3 stores incl. Fever Tree and Stagg Shop)	9.0
Shreveport	
Rubenstein's Inc. (4 La. stores)	10.0
MARYLAND	
Baltimore (Also see District of Columbia listings)	
Brager-Gutman (HRT Ltd., Honolulu, Hawaii) (2 stores in Md.)	13.0
L. Epstein (7 Baltimore Stores) (Also operates a wholesaling business)	20.0
Hecht's (Hecht's, Washington, D.C.) (6 stores in Baltimore Division) (Towson Plaza Mall store opened in Fall 1982)	90.0
Hochschild, Kohn Inc. (Supermarkets General, Woodbridge, N.J.) (10 stores)	74.0
Hutzler's (8 Md. stores)	75 to 80
I. Magnin, White Flint Mall, Bethesda, Md.	12.0
Montgomery Ward	100.0+
Sears Roebuck	100.0
Stewart's (Associated Dry Goods, New York, N.Y.)(5 stores) (To be taken over by Associated Dry Goods' Caldor subdivision in Spring 1983)	45.0
(Bambergers opened a store at White Marsh Mall and one at Hunt Valley Mall in Aug./Sept. 1981. 1st year combined volume is expected to reach $45-to-$50 million. Woodward & Lothrop opened a store at White Marsh Mall in August 1981.)	
MISSISSIPPI	
Hattiesburg	
The Vogue (Fein Bros.-Matison) (2 stores)	6.0
Jackson	
McRae's Inc. (13 Miss. stores. Also a shoe store)	120.0
Meridian	
Marks Rothenberg Co. (3 stores)	5.0
NORTH CAROLINA	
Charlotte	
Collins Dept. Stores (10 stores: N.C. 7, S.C. 3)	20.0
Crest Stores (31 specialty stores)	22.0+
Ivey's Carolinas (J.B. Ivey Co. Div. of Marshall Field & Co., Chicago, Ill.) (13 N.C. stores)	95.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
NORTH CAROLINA	
Whiteville	
Leder Bros. (10 stores in N.C. and S.C.)	$ 6.0
Winston-Salem	
Davis Inc. (3 stores)	6.0
OKLAHOMA	
Checotah	
Sharpe Dept. Store (19 stores)	7.5
Norman	
Harold's (7 stores)	5.0
Oklahoma City	
John A. Brown Co. (Dayton-Hudson, Minneapolis, Minn.) (6 stores in Okla.)	77.0
Shawnee	
Newton Wall Co. (13 stores: Okla. 9, Ark. 1, Miss. 3)	7.0
Tulsa	
Clarke's (5 stores. Downtown Tulsa store closed, rest remodeled).	16.0
Froug's, Inc (10 stores)	20.0
SOUTH CAROLINA	
Charleston	
Condon's Dept. Store (2 stores)	5.0
Kerrison's Dept. Store (4 S.C. stores)	11.0
Cheraw	
B. C. Moore (B. C. Moore & Sons, Wadesboro, N.D.) (46 stores)	30.0
Columbia	
James L. Tapp Co. (4 S.C. stores)	12.0
J. B. White & Co. (Mercantile Stores, New York, N.Y.) (3 stores)	15.0
Greenville	
Meyers-Arnold Co. (9 stores: S.C. 5, N.C. 2, Ga. 2)	28.0
Hartsville	
J. L. Coker (4 S.C. stores)	8.0
Spartanburg	
The Aug. W. Smith Co. (4 stores in S.C.)	6.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (4 stores in Tenn.)	33.0

DEPARTMENT STORE SALES

SOUTH	Approx. Sales (Millions of $)
TENNESSEE	
Bristol	
H.P. King (2 Tenn. stores)	$ 3.5
Chattanooga	
Loveman's (5 stores: Tenn. 4, Ga. 1)	30.0
Jackson	
Kisber's Dept. Store (2 Tenn. stores)	6.0
Knoxville	
Millers Inc. (Allied Stores, New York, N.Y.) (11 stores: Tenn. 9, Ga. 1, Va. 1)	80.0
Ira A. Watson (16 stores: Ala. 2, Ky. 6, Tenn. 4, Va. 1, W.Va. 3)	35.0+
Memphis	
Goldsmith's (Federated Department Stores, Cincinnati, Ohio) (6 stores in Tenn.)	125.2
(Dillard opened 3 stores in addition to existing store, in former Lowenstein locations in suburban Memphis. Expected annual vol. for 4 stores: $45-$50 mil.)	
Nashville	
Cain-Sloan (Allied Stores, New York, N.Y.) (4 stores in Tenn.)	60.0
Castner, Knott Dry Goods Co. (Mercantile Stores) (10 stores: Ala. 2, Ky. 1, Tenn. 7)	100.0
The Harvey Co. (7 stores: Ky. 2, Tenn. 5)	29.0
TEXAS	
Abilene	
Thornton's Department Stores (P.N. Hirsch & Co.) (St. Louis, Mo.) (8 Texas stores)	10.0
Austin	
Joske's (Joske's-Houston, Houston, Tex.) Highland Mall (1 store)	33.0
Scarbrough's (4 Texas stores plus 2 boutiques)	24.0+
Highland Mall	13.0
Foley's (Foley's, Houston, Tex.) Highland Mall (1 store)	34.0
(A 2nd store will be opened, in Barton Creek, and a 3rd in Austin is planned)	
Beaumont	
The Fair Inc. (25 stores in Tex. and La., also operates a wholesaling business)	55.0+
White House Co. (Boston Store D.G. Co., Fort Smith, Ark.) (3 stores: Tex. 2, La. 3)	20.0
(2 Beaumont area stores to be opened in 1983 incl. a replacement downtown store)	

DEPARTMENT STORE SALES

SOUTH

TEXAS

Dallas (also see Fort Worth listings)

	Approx. Sales (Millions of $)
J. Brannam (F. W. Woolworth Co., New York, N.Y.) (5 Dallas-Fort Worth stores)	$ 10 to 13
Dillard's (Dillard Department Stores, Central Division, Fort Worth)	
Dallas-Fort Worth (10 stores)	90 to 95
Valley View	22.0
Richardson Square	15.0+
(Collin Creek Mall, Plano store opened July 1981)	
Frost Bros. (Frost Bros., San Antonio, Texas)	
NorthPark (opened Fall 1981) Projected rate 1st year	6.0
Joske's-Dallas/Phoenix (Allied Stores, New York, N.Y.) (12 stores: Texas 10, Ariz. 2)	100 to 105
Dallas area (10 stores)	90.0
NorthPark	27.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	27.0
NorthPark	15.0
Prestonwood Town Center	10.0
Collin Creek Mall, Plano (opened Oct. 1981)	2.0
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth area (12 stores)	135 to 140
Prestonwood Town Center	10.0
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (16 stores: Tex. 5, Ga. 1, Fla. 1, Md. 1, N.Y. 1, Ill. 2, Mo. 1, Ca. 3, Nev. 1)	450.0
Dallas-Fort Worth area (4 stores)	150.0
Downtown Dallas	49.0
NorthPark	53.5
Prestonwood Town Center	25.0
Fort Worth	22.5
Other Neiman-Marcus stores (available figures)	
Galleria, Houston	56.0
Chicago (2 stores)	30.0
Plaza Frontenac, St. Louis	15.0
Mazza Galleria, Chevy Chase, Md.	15.0
Fashion Show, Las Vegas, Nev. (opened Feb. 1981) Projected 1st year volume:	14.0
Fashion Valley, Dan Diego, Calif. (opened Sept. 1981) Projected 1st year volume:	16.5
(A San Francisco store was opened Nov. 1982. 1st year volume projected to $40 million. A second Houston store is to be opened in 1983)	
J.C. Penney (15 stores)	120.0
NorthPark	27.0
(Collin Creek Mall, Plano store to open in 1983)	
Sakowitz (Sakowitz Inc., Houston, Tex.)	
Dallas store (opened July 1981) Projected annual volume the 1st year:	14 to 18

(Dallas Area continued)

DEPARTMENT STORE SALES

SOUTH

TEXAS

	Approx. Sales (Millions of $)
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Ohio) (13 stores in Tex. In Oct. 1982 assigned responsibility for Levy's, Tucscon, Ariz.)	$ 298.9
Downtown Dallas	28.0
Huelen Mall	26.0
North Hills Mall	18.0
Preston Center	35.0
Valley View	60.0
Sears, Roebuck (Sears, Roebuck, Chicago, Ill.) (13 stores)	286.0
Valley View	49.0
Suzanne S (38 specialty stores, incl. 19 in Dallas-Fort Worth area)	24.0
Target Stores (Dayton-Hudson) (10 stores)	145.0
(1982 store openings, Dallas Galleria, Oct. 1982: Saks Fifth Ave. -- expected annual volume 1st year: $20 million plus; Marshall Field -- expected annual volume 1st year: $12-$15 million. Bloomingdale's will open at Valley View Mall in 1983.)	
El Paso	
Popular Dry Goods Co. (3 stores in El Paso)	30.0
Fort Worth (also see Dallas listings)	
R. E. Cox & Co. (5 stores in Tex. incl. 3 in Fort Worth)	25 to 30
Dillard Dept. Stores - Central Division (Dillard Dept. Stores Inc., Little Rock, Ark.) (24 stores: Kans. 2, Mo. 1, Okla. 8, Tex. 13)	225.0
Dallas-Fort Worth (10 stores)	90 to 95
Monnig's (6 stores in Texas)	30.0+
Montgomery Ward (Montgomery Ward, Chicago, Ill.)	
Dallas-Fort Worth (12 stores)	135 to 140
Striplings (The Dunlap Co., Fort Worth, Tex.) (3 stores)	25.0
Houston	
Foley's (Federated Department Stores, Cincinnati, Ohio) (12 stores in Tex. plus warehouse operation)	547.3
Downtown	78.0
Highland Mall, Austin	34.0
Memorial City	70.0
Sharpstown	86.0
(2 stores were opened in the Fall of 1981: Willowbrook, Houston and North Star Mall, San Antonio. A store is to be opened in Austin)	
Frost Bros. (Frost Bros., San Antonio, Tex.) (3 Houston stores)	27.0
Joske's-Houston (Allied Stores, New York, N.Y.) (9 stores)	125.0
Post Oak	33.0
Lord & Taylor (Lord & Taylor, New York, N.Y.) (3 stores)	39.0
Galleria (Houston)	20.0
Greenspoint Mall	8.0
Memorial City	11.0
(A 4th store, at West Oaks, is to be opened in Feb. 1984. Expect a volume of $10 million the 1st year.)	

(Houston Area continued)

SOUTH	Approx. Sales (Millions of $)
TEXAS	
Houston (continued)	
Marshall Field (Marshall Field & Co., Chicago, Ill.)	
Galleria (1 store)	$ 24.0
Montgomery Ward (Marcor Inc., Wilmington, Del.) (9 Houston area stores, 1 Beaumont store)	165.0
(San Jacinto Mall, Baytown store and Willowbrook, Houston store opened Sept. 1981)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	
Galleria (1 store)	56.0
(A 2nd store, in Town & Country Village, is to be opened in Spring 1983. Projected vol. 1st full year: $20 million.)	
Palais Royal of Houston (19 stores in Houston area, 1 in Orange, Tex., 1 in Beaumont, Tex.)	90.0
(San Jacinto Mall, Baytown and Willowbrook, Houston stores were opened in 1981.)	
J.C. Penney (9 stores, including 5 full-line stores)	132.0
(A store in San Jacinto Mall, Baytown, will be opened in Feb. 1983; Town & Country store, July 1983.)	
Sakowitz Inc. (15 stores incl. 4 full-line stores in Houston plus 2 smaller units and 3 boutiques; 1 store in Amarillo, 1 in Scottsdale, Ariz.; Dallas, 4 boutiques)	125.0
Houston stores	90.0
Other stores	35.0
(The Dallas store was opened July 1981. Annual rate projected for 1st full year:	14 to 18
Post Oak	50.0
(In 1982 hotel boutiques were opened in Dallas and in Houston; a Midland, Texas store was opened in Feb. 1982. A Tulsa store is planned for a 1983 opening; San Antonio in 1984.)	
Saks Fifth Avenue Center of Fashion (Saks Fifth Avenue, New York, N.Y.)(1 store)	26.5
Laredo	
Richter's Dept. Store (1 store)	7.0
Lubbock	
Hemphill-Wells Co. (4 Texas stores)	20.0+
McAllen	
Jones & Jones (1 store)	13.0
San Antonio	
Dillard Dept. Stores, Texas-New Mexico Division (Dillard Dept. Stores, Little Rock, Ark.) (18 stores)	190.0
Frost Bros. (Manhattan Industries, New York, N.Y.) (12 stores in Texas)	105.0
Houston (3 stores)	27.0
NorthPark, Dallas (opened Fall 1981) Projected annual rate the 1st year:	6.0
(A replacement store in Corpus Christi was opened in 1981)	
Joske Bros. (Allied Stores, New York, N.Y.) (8 stores in Texas)	95.0

DEPARTMENT STORE SALES

SOUTH

	Approx. Sales (Millions of $)
TEXAS	
Wichita Falls	
McClurkan's Dept. Store (4 stores)	$ 9.0
Perkins-Timberlake (9 stores: Texas 7, Okla. 2)	10.0
VIRGINIA	
Arlington (also see District of Columbia listings)	
Morton's (6 stores)	8.0
Kilmarnock	
Colonial Variety Store (Southern Dept. Stores Inc., Richmond, Va.) (6 stores)	5.0
Lawrenceville	
W. S. Peebles & Co. (41 stores plus wholesaling operation)	14.0+
Martinsville	
Globman's Stores (3 Va. stores)	8.5
Norfolk	
Rice's-Nachmans (Phillips-Van Heusen Corp., New York, N.Y.) (7 Va. stores)	10.0
Smith & Welton (8 Va. stores)	17.0
Richmond	
Miller & Rhoads (Allied Stores, New York, N.Y.) (22 stores: Va. 16, N.C. 3, Va. 3)	110.0
Southern Dept Stores Inc. (6 stores)	5.0
Thalhimer's (Carter Hawley Hale, Los Angeles, Calif.) (25 stores: Va. 13, N.C. 11, S.C. 1)	185.0
Roanoke	
Heironimus (4 stores)	12.0
Williamsburg	
Casey's Inc. (Southern Department Stores, Richmond, Va.) (1 store)	3.1
WEST VIRGINIA	
Charleston	
A. W. Cox Dept. Store (15 stores in W. Va., Ky., Ohio)	9.0
The Diamond Dept. Store (Associated Dry Goods, New York, N.Y.) (2 stores in W. Va.)	18.0
Holden	
Island Creek Stores Co. (15 stores in W.Va., Va., Ky.)	8.0
Logan	
Sayer Bros. (S & B Wholesale Distributors) (6 stores)	7.0
Parkersburg	
Dils Bros. (2 stores)	6.2

DEPARTMENT STORE SALES

	Approx. Sales (Millions of $)
SOUTH	
WEST VIRGINIA	
Wheeling	
Good's Department Stores Inc. (L.S. Good & Co., Wheeling, W.Va.) (2 stores)	$ 12.0
Stone & Thomas (14 stores in W.Va. incl. specialty stores)	65.0+
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (7 stores: Ariz. 5, N.M. 2)	35.0
Phoenix/Scottsdale Area	
Broadway-Southwest Div., Mesa, Arizona (Carter Hawley Hale, Los Angeles, Calif.) (9 stores: Ariz. 6, Nev. 2, N.M. 1)	109.0
Diamond's, Tempe, Ariz. (Dayton Hudson, Minneapolis, Minn.) (13 stores: Ariz. 10, Nev. 3)	140.3
(A store in Fashion Show Center, Las Vegas, Nev. was opened in Feb. 1981. Expected 1st year volume: $14 to $16 million. An 8th Phoenix store was opened in 1981)	
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (8 stores: Ariz. 6, N.M. 1, Nev. 1)	87.0
(A Foothills Mall, Tucson, Ariz. store was opened in Aug. 1982)	
Las Vegas, Nev.	15.0
Tucson	
Levy's of Tucson (Federated Department Stores, Cincinnati, Ohio) (1 store)	44.3
(Effective Oct. 1982 Levy's of Tucson will report to Sanger-Harris Div., Dallas, Tex.)	
(A 2nd Tucson store was opened by The Broadway-Southwest in Fall 1982)	
CALIFORNIA	
Bakersfield	
Brock's Dept. Store (2 stores)	17.0
Carson	
The Boston Stores Inc. (12 stores: Ariz. 2, Calif. 10)	21.0
Castro Valley	
Daughtery's Dept. Store (3 Calif. stores)	10.0
Eureka	
Meyer Bistrin's Inc. (18 stores)	9.0
Fresno	
E. Gottschalk & Co. (7 stores in Calif. incl. Fashion Fair plus 14 Bobbie West and Village East specialty stores)	90.0+

(continued)

DEPARTMENT STORE SALES

WEST	Approx. Sales (Millions of $)
CALIFORNIA	
Fresno (continued)	
E. Gottschalk & Co. (continued)	
Downtown Fresno	$ 15.0
Merced (a replacement store to be opened in Mar. 1983. Projected 1st year vol.: $10.0 million)	
Fashion Fair (Fresno)	20.0
(Macy's California will open a store in Fresno in the Fall of 1983 in Fashion Fair Mall)	
Glendale	
H. S. Webb & Co. (2 stores)	8.0
Huntington Park	
Wineman's Dept. Store (5 Calif. stores)	12.0
Los Angeles/Long Beach Area	
Abercrombie & Fitch (Oshman's, Houston, Tex.) (3 full-line specialty stores: Beverly Hills, Dallas, Houston; 4 smaller stores: Costa Mesa, Las Vegas, Georgetown, Philadelphia)	7.0
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Calif.) (40 stores)	670.0
Anaheim	15.5
Bakersfield	12.0
Brea	13.4
Carlsbad	11.0
Carson	10.0
Century City	29.0
Cerritos	18.0
Chula Vista	19.0
Crenshaw	9.5
Del Amo	31.0
Downey	17.4
Fox Hills	21.0
Glendale	25.0
Grossmont	15.2
Hawthorne	12.0
Hollywood	8.0
Huntington Beach	19.0
La Jolla	15.0
Laguna Hills	16.0
Long Beach	13.5
Los Angeles (downtown)	25.0
Montclair	14.0
Newport Beach	15.0
Northridge	22.0
Orange	17.0
Panorama City	19.0
Pasadena	14.4

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
Broadway-Southern California (continued)	
Puente Hills	$ 16.0
Riverside	12.8
San Bernardino	13.5
San Diego	24.0
Santa Anita	21.2
Santa Monica	19.0
Sherman Oaks	21.0
Topanga Plaza	17.0
Thousand Oaks	13.3
Ventura	15.0
West Covina	16.0
Westchester	9.6
Whittier	10.0
(La Cienega Blvd., Beverly Center store opened March 1982. Expected volume the 1st year: $24 to $25 million)	
Buffum's, Long Island (11 junior department stores and 4 Buffum's Sportswear Shops)	109.0
Arcadia	8.0
Glendale Grossmont	5.5
Laguna Hills	6.0
La Habra	5.4
Lakewood	4.0
Long Beach	8.0
Long Beach Marina	4.5
Manhattan Beach	8.2
Newport	5.8
Palos Verdes	9.2
Pomona	6.3
San Diego	12.6
Santa Ana	5.8
Westminster	9.0
Bullock's (Federated Department Stores, Cincinnati, Ohio) (18 stores: Calif. 15, Nev. 1, Ariz. 2)	499.9
(2 stores were opened in Feb. 1982: at the Beverly Hills Center and in Manhattan Beach)	
Bullock's Wilshire (Division of Bullock's, Los Angeles) (6 specialty stores)	65.0
Contempo Casuals (Carter Hawley Hale, Los Angeles, Calif.) (55 stores)	45.0
Harris Co., San Bernardino (5 stores)	30.0
H. C. Henshey Co., Santa Monica (2 stores)	9.0
Hinshaw's Dept. Stores, Whittier (2 stores)	25.0
Judy's Inc., Van Nuys (72 stores)	49.6
I. Magnin (Southern Division of I. Magnin & Co., San Francisco) (10 stores)	93.0
Beverly Hills	26.0
South Coast Plaza, Costa Mesa	15.0

(Los Angeles/Long Beach Area continued)

WEST

CALIFORNIA

Los Angeles/Long Beach Area (continued)

	Approx. Sales (Millions of $)
May Co.--California, Los Angeles (May Dept. Stores, St. Louis, Mo.) (33 stores)	615.0
Arcadia	17.5
Brea	17.0
Buena Park	18.0
Canoga Park (Tipanga Plaza)	24.0
Carlsbad	15.8
Cerritos	3.0
Costa Mesa	36.0
Crenshaw	11.0
Eagle Rock	20.0
El Cajon	13.2
Fox Hills	21.0
La Jolla	11.0
Lakewood	30.5
Los Angeles (downtown)	33.0
Laurel Plaza	30.0
Mission Viejo	14.0
Montclair	15.4
Oxnard	13.0
Palos Verdes (opened Aug. 1981)	6.0
Pasadena	5.8
Plaza Bonita (opened Mar. 1981)	11.0
Redondo Beach	34.0
Riverside	14.0
San Bernardino	15.0
San Diego	29.0
Sherman Oaks	12.4
The City	14.0
Thousand Oaks	15.0
Eastland	20.0
Westland	27.0
Westminster	23.0
Whittier	12.0
Wilshire	32.0
(Palm Desert Town Center store opened in 1982. The May Co. will open 7 additional Calif. stores through 1985, including a downtown L.A. store scheduled for a 1983 opening.)	
Mervyn's, Hayward, Calif. (Dayton Hudson, Minneapolis, Minn.) (21 stores in Southern Calif. area, including 4 opened in 1981.)	200.0+
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (2 stores)	55.0
Beverly Hills	39.0
Fashion Island, Newport Beach	16.0
(Also operates 2 stores in San Diego)	

(Los Angeles/Long Beach Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
Los Angeles/Long Beach Area (continued)	
Nordstrom (Nordstrom's, Seattle, Wash.) (4 Southern Calif. stores)	90.0
South Coast Plaza, Costa Mesa	43.0
Brea	18.0
Cerritos (opened in 1981)	13.0
San Diego	16.0
J.C. Penney (26 full-line and 27 smaller stores in Southern Calif.)	400.0
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 stores in Calif.)	378.0
Downtown Los Angeles	27.5
Anaheim	12.3
Arcadia	14.1
Beverly Hills	39.0
Cerritos (Renovated in 1981)	15.7
Del Amo (opened Aug. 1981)	14.0
Glendale	17.3
Mission Viejo	9.0
Newport Beach (Renovated in 1981)	28.0
Palm Springs	4.2
Panorama City	11.0
Pasadena	14.5
Puente Hills	16.6
San Diego (Renovated in 1981)	22.0
Santa Barbara	28.0
Santa Monica (opened in Aug. 1981)	14.0
Sherman Oaks	13.0
Thousand Oaks	14.8
University Town Center	16.8
Westminster	16.4
Woodland Hills	30.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (5 stores in Southern California)	72.0
Beverly Hills	31.0+
South Coast Plaza, Costa Mesa	14.0
Woodland Hills	17.0
Sears, Roebuck (Sears, Roebuck & Co., Chicago, Ill.)	800.0
Modesto	
C. H. Dunlap (4 specialty stores in Calif.)	11.0
Loeb's Dept. Store (1 store)	2.0
(Macy's California opened a store in Modesto in August 1981)	
Orange	
Louis Miller Inc. (5 stores)	12.0
Pacific Grove	
Holman's Dept. Store Inc. (3 stores)	10.0

DEPARTMENT STORE SALES

WEST

CALIFORNIA

	Approx. Sales (Millions of $)
Sacramento	
Weinstock's (Carter Hawley Hale, Los Angeles, Calif.) (12 stores: Calif. 8, Nev. 1, Utah 3)	144.0
Sacramento stores, total	73.2
Downtown	15.0
Arden Fair	11.2
Country Club	18.0
Florin	11.0
Sunrise	18.0
Other stores:	
Fresno	15.0
Modesto	10.0
Stockton	11.0
Reno, Nev.	14.0
Murray, Utah	7.5
Ogden, Utah (opened Aug. 1981)	4.5
Salt Lake City, Utah	8.5
San Bernardino	
Harris Co. (5 stores)	30.0
San Diego (Also see Los Angeles listings)	
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	
San Diego	15.0
Fashion Valley (opened Sept. 1981)	7.5
Nordstrom (Nordstrom Inc., Seattle, Wash.)	
Fashion Valley (opened Aug. 1981)	16.0
(3 additional area stores to be opened in 1984/1985)	
Walker Scott (12 department and specialty stores in Southern Calif.)	45.4
San Francisco/Oakland	
Bullock's-Northern California, Palo Alto (Federated Dept. Stores, Cincinnati, Ohio) (6 Calif. stores)	88.6
Emporium Capwell (Carter Hawley Hale, Los Angeles, Calif.) (20 Calif. stores)	500.0
Liberty-House California, Oakland (Amfac Inc., Honolulu, Hawaii) (14 stores: Calif. 13, Nev. 1)	127.0
(2 stores, Hayward and Dublin branches, to be closed Jan. 1983)	
Hayward	10.0
Dublin	6.0
Macy's California (R. H. Macy, New York, N.Y.) (21 stores: Calif. 20, Nev. 1)	670.0
Union Sq., San Francisco	131.0
(Fashion Fair, Fresno, Calif. store to open in Fall 1983; Solano and Corte Madera, Calif. stores to open in 1984)	

(San Francisco/Oakland Area continued)

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
CALIFORNIA	
San Francisco/Oakland (continued)	
I. Magnin (Federated Dept. Stores, Cincinnati, Ohio) (25 stores: Calif. 18, Ariz. 1, Ore. 1, Wash. 1, Ill. 3, Md. 1)	$ 257.6
Northern California Area	100.0+
Union Square, San Francisco	55.4
Southern Division, Los Angeles	93.0
Joseph Magnin (Acquired by Acquihold Corp., San Francisco, from Hillman Co. in Dec. 1982) (37 specialty stores plus 7 franchised Gucci operations)	100.0
(Plans were announced to close 14 stores in 1983, leaving 22 Joseph Magnin stores and 7 freestanding Gucci units in operation at the end of 1983.)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (3 Northern California stores)	40.0+
(A replacement for the downtown store was opened in August 1981. Reached an annual rate of $36 million in the first full year.)	
Smith's Clothiers of California, Oakland, Calif. (24 stores: Calif. 23, Nev. 1)	23.0
San Mateo	
Levy Brothers Dept. Store (7 Calif. stores)	10.0
Santa Cruz	
Samuel Leask (2 California stores)	5.0
Santa Monica	
H. C. Henshey Co. (2 California stores)	10.0
Santa Rosa	
Rosenberg's Inc. (Gamble Dept. Stores, Chicago, Ill.) (1 store)	10.0
Sun Valley	
Nahas Enterprises (13 stores in Calif.)	19.0
Watsonville	
Charles Ford & Co. (5 department stores and 3 specialty stores in Calif.)	15.0
COLORADO	
Denver	
Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 Colorado stores)	120.0
(A 13th store will be opened in March 1983 in Southwest Plaza, Denver)	
Fashion Bar (73 specialty stores)	60.0
Joslin Dry Goods (Mercantile Stores, New York, N.Y.)(5 Colorado stores)	95.0
May-D & F (May Department Stores, Denver, Colo.) (9 stores)	120.0
Neusteters (4 stores)	20.0

DEPARTMENT STORE SALES

WEST

	Approx. Sales (Millions of $)
HAWAII	
Honolulu	
Liberty House (Amfac Inc., Honolulu) (6 department stores and 41 resort/specialty shops in Hawaii) (Kaui stores were closed in May 1981)	$ 166.7
Shirokiya Inc. (6 stores)	26.0
IDAHO	
Boise	
The Bazaar (3 stores)	6.0
The Mode (2 stores)	5.0
Shaver's Inc. (4 stores)	8.5
MONTANA	
Billings	
Hart-Albin (2 dept. stores plus men's store & book store)	9.0
NEVADA	
Las Vegas	
Bullock's (Bullock's South, Los Angeles, Calif.)	16.0
Diamond's (Diamond's, Tempe, Ariz.)	14 to 16
Goldwater's (Goldwater's, Scottsdale, Ariz.)	15.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.)	14.0
Saks (Saks Fifth Avenue, New York, N.Y.)	8.0
OREGON	
Portland	
Meier & Frank (May Department Stores, St. Louis, Mo.) (7 stores: Oregon 6, Wash. 1)	175.0
Downtown Portland	32.0
UTAH	
Salt Lake City	
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (8 stores: Utah 7, Idaho 1)	134.2
Pasco	
Grigg Enterprises (5 stores)	12.0
WASHINGTON	
Seattle/Everett/Spokane Area (The Northwest)	
The Bon (Allied Stores, New York, N.Y.) (32 stores: Wash. 15, Ore. 6, Idaho 6, Mont. 3, Utah 2)	344.0
The Crescent (Marshall Field, Chicago, Ill.) (3 Spokane stores)	36.0+
Frederick & Nelson, Seattle (Marshall Field, Chicago, Ill.) (15 stores: Wash. 8, Ore. 7)	215.0
Jay Jacobs, Seattle (42 specialty stores)	21.0
Lamont's Apparel, Seattle (Pay 'N Save) (23 stores in Wash., Alaska, Ore., Idaho)	80.0

DEPARTMENT STORE VOLUME LEADERS

Following is a compilation of leading department stores, listed by buying or divisional headquarter locations, and showing the total reported or estimated sales for the year 1981 (or closest fiscal period) attributed to each headquarter operation. This includes sales of all stores (limited to department stores where possible) operated by the listed company. Not included in this list are national chains, such as Sears, Ward and Penney, promotional chains, such as K mart, and national chain department stores without divisional buying operations.

STORES WITH SALES OF $100 MILLION & OVER

	Sales Volume (Millions of $)
Macy's New York, N.Y. (R.H. Macy) (15 stores plus furniture clearance and auto centers)	$ 875.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 stores)	800.0
Saks Fifth Avenue, New York, N.Y. (Batus, Inc.)	712.0
Macy's California, San Francisco, Calif. (R.H. Macy) (19 stores)	670.0
Broadway Southern California, Los Angeles, Calif. (Carter Hawley Hale) (40 stores)	670.0
J.L. Hudson, Detroit, Mich. (Dayton Hudson) (19 stores)	658.1
Bloomingdale's, New York, N.Y. (Federated) (16 stores)	647.4
May Company-California, Los Angeles, Calif. (May Department Stores) (33 stores)	615.0
Marshall Field, Chicago, Ill. (Batus, Inc.) (19 stores)	610.0
Abraham & Straus, Brooklyn, N.Y. (Federated) (14 stores)	605.0
Burdine's, Miami, Fla. (Federated) (21 stores)	565.5
Foley's, Houston, Tex. (Federated) (12 stores)	547.3
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (37 stores)	528.0
Alexander's, New York, N.Y. (16 stores)	523.6
Capwell's, San Francisco, Calif. (Carter Hawley Hale) (20 stores)	500.0
Bullock's, Los Angeles, Calif. (Federated) (18 stores)	499.9
Neiman Marcus, Dallas, Texas (Carter Hawley Hale) (16 stores)	450.0
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (11 stores)	425.6

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Jordan Marsh, Boston, Mass. (Allied Stores) (14 stores)	$ 416.0
Dayton's, Minneapolis, Minn. (Dayton Hudson) (13 stores)	410.1
Hecht's, Washington, D.C.-Baltimore, Md. (May Dept. Stores) (21 stores)	405.0
Rich's Inc., Atlanta, Ga. (Federated) (17 stores)	398.8
Robinson's, Los Angeles, Calif. (Associated Dry Goods) (21 stores)	378.0
F & R Lazarus, Columbus, Ohio (Federated) (16 stores)	375.5
The Bon, Seattle, Wash. (Allied Stores) (32 stores)	344.0
John Wanamaker, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	335.0
Woodward & Lothrop, Washington, D.C. (15 stores)	334.8
Famous Barr, St. Louis, Mo. (May Dept. Stores) (14 stores)	328.0
Filene's, Boston, Mass. (Federated) (17 stores)	321.6
Carson Pirie Scott, Chicago, Ill. (24 stores)	311.1
Sanger Harris, Dallas, Tex. (Federated) (13 stores)	298.9
B. Altman, New York, N.Y. (The Altman Foundation) (6 stores)	295.0
Kaufmann's, Pittsburgh, Pa. (May Dept. Stores) (10 stores)	287.0
Strawbridge & Clothier, Philadelphia, Pa. (11 stores)	275.0
Gimbel's New York, New York, N.Y. (Batus, Inc.) (10 stores)	270.0
Maas Bros., Inc., Tampa, Fla. (Allied Stores) (19 stores)	265.0
I. Magnin, San Francisco, Calif. (Federated) (25 stores)	257.6
Dillard Dept. Stores-Central Div., Fort Worth, Tex. (Dillard Dept. Stores) (24 stores)	225.0
The May Co., Cleveland, Ohio (May Dept. Stores) (10 stores)	222.0
Shillito's, Cincinnati, Ohio (Federated) (9 stores)	221.1
D. H. Holmes Co., New Orleans, La. (13 stores)	215.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Frederick & Nelson, Seattle, Wash. (Marshall Field) (15 stores)	$ 215.0
Davison's, Atlanta, Ga. (R.H. Macy) (12 stores)	214.0
Hess's, Allentown, Pa. (Crown America Corp.) (24 stores)	211.0
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (13 stores)	210.0
Higbee's, Cleveland, Ohio (11 stores)	206.3
Dillard Dept. Stores-Texas-New Mexico Div., San Antonio, Tex. (Dillard Dept. Stores, Little Rock, Ark.) (18 stores)	190.0
Elder-Beerman, Dayton, Ohio (23 stores)	190.0
May's, Brooklyn, N.Y. (11 stores)	189.0
L. S. Ayres & Co., Indianapolis, Ind. (Associated Dry Goods) (12 stores)	186.0
Macy's Midwest, Kansas City, Mo. (R. H. Macy) (21 stores)	186.0
Bergner's, Peoria, Ill. (26 stores)	185.0
Thalhimers-Virginia and North Carolina Divs., Richmond, Va. (25 stores)	185.0
Dillard's Little Rock Div., Little Rock, Ark. (Dillard Dept. Stores Inc.) (14 stores)	178.0
Wieboldt Stores, Chicago, Ill. (15 stores)	177.9
Meier & Frank, Portland, Ore. (May Dept. Stores) (7 stores)	175.0
Gimbels-Philadelphia, Philadelphia, Pa. (Batus, Inc.) (10 stores)	170.0
Gimbels Midwest, Milwaukee, Wis. (Batus, Inc.) (11 stores)	170.0
G. Fox, Hartford, Conn. (May Dept. Stores) (8 stores)	170.0
Jacobson Stores, Jackson, Mich. (16 stores)	169.3
Liberty House-Hawaii, Honolulu, Hawaii (6 stores)	166.7
Younker's, Des Moines, Iowa (Equitable of Iowa) (29 stores)	165.0
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores)	160.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Sibley's, Rochester, N.Y. (Associated Dry Goods) (14 stores)	$ 155.0
Boscov's Department Stores, Reading, Pa. (8 stores)	150.0
Glosser Brothers, Johnstown, Pa. (not incl. Gee Bee Discount Stores)	150.0
Gimbels, Pittsburgh, Pa. (Batus, Inc.) (7 stores)	150.0+
J. Byron's, Miami, Fla. (Jack Eckerd Corp.) (39 stores)	148.9
McAlpin Co., Cincinnati, Ohio (Mercantile Stores) (9 stores)	145.0
Howland Steinbach, White Plains, N.Y. (not incl. Hochschild Kohn) (28 stores)	145.0
Weinstock's, Sacramento, Calif. (Carter Hawley Hale) (12 stores)	144.0
Stix Baer & Fuller, St. Louis, Mo. (Associated Dry Goods) (13 stores)	141.0
Diamond's, Tempe, Ariz. (Dayton Hudson) (13 stores)	140.3
ZCMI, Salt Lake City, Utah (7 stores)	134.2
C. J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (12 stores)	130.0
Liberty House of Calif., Oakland, Calif. (Amfac) (14 stores)	127.0
M. O'Neil Co., Akron, Ohio (May Dept. Stores) (10 stores)	126.0
Goldsmith's, Memphis, Tenn. (Federated) (6 stores)	125.2
Joske's-Houston, Houston, Tex. (Allied Stores) (9 stores)	125.0
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	125.0
Rike's, Dayton, Ohio (Federated) (6 stores)	120.9
Stern's, Paramus, N.J. (Allied Stores) (7 stores)	120.0
May-D & F, Denver, Colo. (May Dept. Stores) (9 stores)	120.0
McRae's, Jackson, Miss. (13 stores)	120.0
Denver Dry Goods, Denver, Colorado (Associated Dry Goods) (12 stores)	120.0
Boston Store, Milwaukee, Wis. (Federated) (7 stores)	111.5
Prange's, Green Bay, Wis. (19 stores)	110.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $100 MILLION & OVER (continued)

	Sales Volume (Millions of $)
Miller & Rhoads Inc., Richmond, Va. (Allied Stores) (22 stores)	$ 110.0
Buffum's, Long Beach, Calif. (15 stores)	109.0
Broadway-Southwest Div., Mesa, Ariz. (Carter Hawley Hale) (9 stores)	109.0
Donaldson's, Minneapolis, Minn. (Allied Stores) (9 stores)	107.0
Frost Brothers, San Antonio, Tex. (Manhattan Inds.) (12 stores)	105.0
Joske's-Dallas/Phoenix, Dallas, Tex. (Allied Stores) (12 stores)	105.0
Castner Knott Dry Goods, Nashville, Tenn. (Mercantile Stores) (10 stores)	100.0
Hahne's, Newark, N.J. (Associated Dry Goods) (8 stores)	100.0

STORES WITH SALES VOLUME OF $50 - TO - $99 MILLION

Sales Volume $80-to-$99 Million

- Adam, Meldrum & Anderson, Buffalo, N.Y. (9 stores)
- B. Gertz Inc., Plainview, N.Y. (Allied Stores) (9 stores)
- McCurdy & Co., Rochester, N.Y. (6 stores)
- William H. Block & Co., Indianapolis, Ind. (Allied Stores) (9 stores)
- J. L. Brandeis & Sons, Omaha, Neb. (10 stores)
- Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (14 stores)
- Goudchaux's Inc., Baton Rouge, La. (3 stores)
- Ivey's Carolinas, Charlotte, N.C. (J. B. Ivey Co.) (13 stores)
- Millers Inc., Knoxville, Tenn. (Allied Stores) (11 stores)
- Joske Bros., San Antonio, Tex. (Allied Stores) (8 stores)
- Goldwater's, Scottsdale, Ariz. (Assoc. Dry Goods) (8 stores)
- E. Gottschalk, Fresno, Calif. (7 stores)
- Bullock's-Northern California, Palo Alto, Calif. (Federated) (6 stores)
- Joslin Dry Goods, Denver, Colo. (Mercantile Stores) (5 stores)

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES VOLUME OF $50 - TO - $99 MILLION (continued)

Sales Volume $60-to-$79 Million

D. M. Read Inc., Bridgeport, Conn. (Allied Stores) (5 stores)

The Dry Goods, Aston, Pa. (SCOA Inds.) (4 stores)

Pomeroy's Inc., Levittown, Pa. (Allied) (8 stores)

Crowley Milner & Co., Detroit, Mich. (10 stores)

H. & S. Pogue Co., Cincinnati, Ohio (Associated Dry Goods) (5 stores)

The Lion Dry Goods Co., Toledo, Ohio (Mercantile Stores) (4 stores)

Strouss, Youngstown, Ohio (May Department Stores) (9 stores)

Pizitz Inc., Birmingham, Ala. (12 stores)

Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (7 stores)

Ivey's Florida, Winter Park, Fla. (Marshall Field) (10 stores)

Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)

West Bros. Inc., DeRidder, La. (30 stores)

Maison Blanche, New Orleans, La. (City Stores) (8 stores)

Hochschild Kohn Inc., Baltimore, Md. (Supermarkets General) (10 stores)

Hutzler's, Baltimore, Md. (8 stores)

John A. Brown Co., Oklahoma City, Okla. (Dayton Hudson) (6 stores)

Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)

Stone & Thomas, Wheeling, West Va. (14 stores)

Sales Volume $50-to-$59 Million

Albert Steiger Inc., Springfield, Mass. (9 stores)

Pomeroy's Inc., Harrisburg, Pa. (Allied Stores) (6 stores)

S. Grumbacher & Sons, York, Pa. (14 stores)

Gayfers, Montgomery, Ala. (6 stores)

The Fair Inc., Beaumont, Tex. (25 stores)

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing -- including the operation of traditional department stores, discount stores, apparel specialty stores and catalog operations. Many of these chains are engaged in non-related activities, including the operation of supermarkets or other hard goods outlets, manufacturing, wholesaling or diverse activities, such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted.

Retail Chain	1981/1982 Sales* (Millions of $)
Alexander's Inc., New York, N.Y. (Sold Margo's La Mode to Elder Beerman in July 1981.) Sales adjusted to fiscal year ending Feb. 1982:	$ 509.7
Allied Stores Corp., New York, N.Y. (Includes $543 million in sales of Garfinckel, Brooks Bros., Miller & Rhoads which was acquired in 1981.)	2,732.1
Ames Department Stores, Inc., Rocky Hill, Conn.	383.1
Amfac, Inc., Honolulu, Hawaii (Liberty House sales: $292.6 million)	2,148.0
C.R. Anthony & Co., Oklahoma City, Okla.	374.2
Associated Dry Goods Corp., New York, N.Y. (Acquired Caldor Inc. in May 1981)	2,751.2
Batus Retail Group, Inc., New York, N.Y.	2,158.4
L.L. Bean, Freeport, Me.	182.0
Belk Stores, Charlotte, N.C.	1,365.2
Bradlees, Braintree, Mass. (The Stop & Shop Companies) (91 stores)	720.0
Brooks Fashion Stores, Inc., New York, N.Y.	179.1
Brown Group Inc., St. Louis, Mo.	1,337.8
Caldor, Norwalk, Conn. (Acquired by Associated Dry Goods in May 1981) (74 stores)	778.0
Carson Pirie Scott & Co., Chicago, Ill. (Department stores division sales: $311.1 million)	769.7
Carter Hawley Hale Stores, Inc., Los Angeles, Calif. (Department store division sales: $2.3 billion)	2,870.7
Charming Shoppes, Inc., Cornwell Hts., Pa.	143.9
City Stores Corp., New York, N.Y.	157.6
Danners, Inc. (Three-D), Indianapolis, Ind.	143.4
Dayton Hudson Corp., Minneapolis, Minn. (Including Mervyn's, Hayward, Calif., which had sales of $1.1 billion, the department store division's sales amounting to $1.3 billion and Target Stores which did about $2.0 billion)	4,942.9
Dillard Department Stores, Inc., Little Rock, Ark. (Including three department store divisions: Central Division, Texas-New Mexico Division, Little Rock Division)	592.9
Dollar General Corp., Scottsville, Ky.	245.5
Duckwall-ALCO Stores Inc., Abilene, Kans.	199.1
Dunlap Co., Fort Worth, Tex.	75.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	1981/1982 Sales* (Millions of $)
Edison Bros. Stores, Inc., St. Louis, Mo. (Specialty store division sales: $219 million)	$ 951.4
Elder Beerman Stores Corp., Dayton, Ohio (Department store division: $190.0 million)	235.2
Family Dollar Stores, Inc., Charlotte, N.C.	181.7
Federated Department Stores Inc., Cincinnati, Ohio (Includes Department Store Group's sales of $5.2 billion)	7,067.7
Gap Stores Inc., San Bruno, Calif.	417.4
Gaylords National Corp., Secaucus, N.J.	118.3
Genesco Inc., Nashville, Tenn.	662.5
Glosser Brothers, Inc., Johnstown, Pa.	181.7
HRT Industries Inc., Los Angeles, Calif. (formerly Hartfield-Zody's)	391.1
Heck's Inc., Charleston, W.Va.	473.8
Howland-Steinbach, Hochschild, Kohn, Woodbridge, N.J. (Supermarkets General)	188.3
Interco Inc., St. Louis, Mo. (General merchandise division sales, including P.N. Hirsch: $672.2 million)	2,673.8
Jack Eckerd Corp., Clearwater, Fla. (Including J. Byron's sales, estimated at $148.9 million)	1,752.6
Jacobson Stores Inc., Jackson, Mich.	169.3
Jamesway Corp., Secaucus, N.J.	296.2
K mart Corp., Troy, Mich.	16,527.0
KDT Industries Inc. (formerly Kings Dept. Stores Inc.), Newton, Mass.	741.4
Lane Bryant Inc., New York, N.Y.	419.0
Limited Stores Inc., Columbus, Ohio	364.9
R. H. Macy & Co., Inc., New York, N.Y. (Fiscal year ending Jan. 1982)	2,825.9
Manhattan Industries, Inc., New York, N.Y. (Including Frost Bros. Sales of $104.4 million)	377.8
Marshall Field & Co., Chicago, Ill.	1,194.0
May Department Stores Co., St. Louis, Mo. (Department store group sales: $2.5 billion; Venture Stores, $610 million)	3,401.0
J.M. MacDonald Co., Hastings, Neb.	70.0
Melville Corp., Harrison, N.Y. (including apparel and toy divisions only)	1,060.1
Mercantile Stores Co., Wilmington, Del.	1,269.5
Miller-Wohl Co., Secaucus, N.J.	220.9
Montgomery Ward (Marcor Ind.), Chicago, Ill. (Sales of Jefferson Ward Stores: $553 million)	5,742.0
G. C. Murphy Co., McKeesport, Pa.	817.8
New Process Co., Warren, Pa.	231.3
S.E. Nichols, Inc., New York, N.Y.	231.6
Nordstrom Inc., Seattle, Wash.	522.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	1981/1982 Sales* (Millions of $)
Oshman's, Houston, Tex.	$ 216.4
Pamida, Omaha, Neb. (Sales of Paul Harris Stores, $86.3 million)	335.0
J.C. Penney Co., Inc., New York, N.Y.	11,860.0
Petrie Stores Corp., Secaucus, N.J.	529.8
Phillips-Van Heusen Corp., New York, N.Y.	431.1
H.C. Prange Co., Sheboygan, Wis. (PrangeWay Discount Store sales estimated at $125.0 million)	225.2
Rapid-American (Lerner, McCrory and Britts Divs.), New York, N.Y.	1,513.0
Rose's Stores Inc., Henderson, N.C.	594.8
Salkin & Linoff Inc., Minneapolis, Minn.	70.0
SCOA Industries Inc., Columbus, Ohio (Hills Department Stores volume estimated at $790 million)	1,057.6
Sears, Roebuck & Co., Inc., Chicago, Ill. (U.S. merchandising operation only)	18,228.8
Sprouse-Reitz Co., Inc., Portland, Ore.	151.6
Sterling Stores Co., Little Rock, Ark.	130.7
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores, estimated at $143 million)	425.6
Super Valu Stores Inc., Minneapolis, Minn. (Excluding supermarket sales, but including County Seat sales estimated at $180 million)	521.0
Twin Fair, Buffalo, N.Y.	233.0
U.S. Shoe Corp., Cincinnati, Ohio (Including specialty retailing division sales: $457.7 million)	1,088.0
Wal-Mart Stores Inc., Bentonville, Ark.	2,445.0
Winkelman Stores, Inc., Detroit, Mich.	99.8
Winn's Stores Inc., San Antonio, Tex.	134.4
F.W. Woolworth Co., New York, N.Y. (Woolco Div., which had 1981 sales estimated at $2.2 billion, is to be closed)	7,223.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies, Des Moines)	164.6
Zayre Corp., Framingham, Mass.	1,797.1

---

*Sales figures for companies which publish this information are for the latest available fiscal year unless otherwise noted. The remainder represent estimates for the year 1981.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS

Corporation & Retail Division	Location of Headquarter Office or Headquarter Store
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Bros.	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe (Plus Size)	Memphis Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Minn.
Field's (L.H. Field Co.)	Jackson, Mich.
Garfinckel's	Washington, D.C.
Gertz (B. Gertz, Inc.)	Bayshore, N.Y.
Harzfelds	Kansas City, Mo.
Heer's	Springfield, Mo.
Herp's-Hardy's	Muskegon, Mich.
Jordan Marsh-New England	Boston, Mass.
Jordan Marsh-Florida	Miami, Fla.
Joske's	Dallas, San Antonio and Houston, Tex.
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg and Levittown, Pa.
Read's	Bridgeport, Conn.
Stern's	Paramus, N.J.
Troutman's (A.E. Troutman Co.)	Greensburg, Pa.
Wren's (Edward Wren Store)	Springfield, Ohio
Almy Stores, Inc.	Brighton, Mass.
Almy's	Brighton, Mass.
Edgar's	Fall River, Mass.
Edwards	Greece and Pittsford, N.Y.
Freese's	Bangor, Maine
Gorin's	Brighton, Mass.
House & Hale	Manchester, Conn.
Star Store	New Bedford, Mass.
R.H. White	Worcester, Mass.
Witherill (L.A. Witherill, Inc.)	Brighton, Mass.
Amfac, Inc.	Honolulu, Hawaii
Liberty House of California	Oakland, California
Liberty House of Hawaii	Honolulu, Hawaii

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES
OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianapolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Colo.
The Diamond	Charleston, West Virginia
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Lord & Taylor	New York, N.Y.
The H & S Pogue Co.	Cincinnati, Ohio
Powers Dry Goods Co.	Minneapolis, Minn.
J.W. Robinson Co.	Los Angeles, Calif.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co. (merged with William Hengerer Co.)	Rochester, N.Y.
Stewart & Co.	Baltimore, Md.
The Stewart Dry Goods Co.	Louisville, Ky.
Stix, Baer & Fuller	St. Louis, Mo.
Sycamore Specialty Stores	Indianapolis, Ind.
Batus, Inc. (Batus Retail Group)	New York, N.Y.
Gimbels Department Stores	New York, N.Y.; Philadelphia and Pittsburgh, Pa.; Milwaukee, Wis.
Kohl's Department Stores	Brookfield, Wis.
Saks Fifth Avenue	New York, N.Y.
Thimbles	Chicago, Ill.
(acquired Marshall Field & Co., Chicago, in 1982)	
Carter Hawley Hale Stores, Inc.	Los Angeles, Calif.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Calif.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Calif.
Emporium Capwell	San Francisco, Calif.
Neiman-Marcus	Dallas, Tex.
Thalheimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Calif.
City Stores Co.	New York, N.Y.
Maison Blanche Co. (6) (sold 5, closed 1 in 1982)	New Orleans, La.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Cluett, Peabody & Co., Inc.	New York, N.Y.
Boyd's	St. Louis, Mo.
Lytton's	Chicago, Ill.
Dayton Hudson Corp.	Minneapolis, Minn.
John A. Brown	Oklahoma City, Okla.
Dayton's	Minneapolis, Minn.
Diamond's	Phoenix, Ariz.
Hudson's (J.L. Hudson Co.)	Detroit, Mich.
Mervyn's	Hayward, Calif.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	San Diego, Calif.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
The Elder Beerman Stores Corp.	Dayton, Ohio
Margo's La Mode	Dallas, Texas
Federated Department Stores, Inc.	Cincinnati, Ohio
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store	Milwaukee, Wis.
Bullock's	Los Angeles, Calif.
Bullock's Northern California	Palo Alto, Calif.
Burdine's	Miami, Fla.
Filene's	Boston, Mass.
Foley's	Houston, Tex.
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Ohio
Levy's	Tucson, Ariz.
I. Magnin	San Francisco, Calif.
Rich's	Atlanta, Ga.
Sanger-Harris	Dallas, Tex.
Shillito's/Rike's (operation combined in April 1982)	Cincinnati, Ohio
(Merger with The Children's Place, Pine Brook, N.J. was completed in March 1982)	
Genesco, Inc.	Nashville, Tenn.
Baron's	Miami Beach, Fla.
The following were sold during 1981:	
Burkhardt's	Cincinnati, Ohio
M. Gilbert & Sons	uth Bend, Ind.
Graves, Cox & Co., Inc.	Lexington, Ky.
Hall-Brown	Nashville, Tenn.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES
OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Hart-Schaffner & Marx	Chicago, Ill.
J.P. Allen	Atlanta, Ga.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Kansas
Blackburn's	Amarillo, Tex.
Capper & Capper, Ltd.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansille, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Bros.	San Antonio, Tex.
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Calif.
Jack Henry	Kansas City, Mo.
Heyward-Mahon	Greenville, S.C.
J.O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer Mfg. Co. (40 factory outlets acquired December 1982)	Atlanta, Ga.
Leopold Price & Rolle	Houston, Tex.
Levy/Wolf	Jacksonville, Fla.
Liemandt's	Minneapolis, Minn.
Littler's	Seattle, Wash.
Merritt Schaefer & Brown	Austin, Tex.
Porter-Stevens	New Orleans, La.
Root's	Summit, N.J.
Shulman's	Norfolk, Va.
Silverwoods	Los Angeles, Calif., Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F.R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Ohio
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Wicks & Greenman	Utica, N.Y.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Wolff's	St. Louis, Mo.
Zachry	Atlanta, Ga.
Interco, Incorporated	St. Louis, Mo.
Alberts	Detroit, Mich.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
P.N. Hirsch	St. Louis, Mo.
Standard Sportswear, Inc.	Pittsburgh, Pa.
United Shirt Distributors, Inc.	Detroit, Mich.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Davison's	Atlanta, Ga.
Macy's California	San Francisco, Calif.
Macy's Midwest	Kansas City, Mo.
Macy's New York	New York, N.Y.
Manhattan Industries, Inc.	New York, N.Y.
Brand Name Fashion Outlet	Glen Rock, N.J.
Frost Brothers, Inc.	San Antonio, Tex.
Manhattan Ward, Inc.	Conshohocken, Pa.
Marshall Field & Co., Inc. (acquired by Batus, Inc. in 1982)	Chicago, Ill.
The Crescent	Spokane, Wash.
Marshall Field & Co.	Chicago, Ill.
Frederick & Nelson	Seattle, Wash.
J.B. Ivey & Co.	Charlotte, N.C.
The May Department Stores Co.	St. Louis, Mo.
Famous Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Ohio
May Co. California	Los Angeles and San Diego, Calif.
May-D & F	Denver, Colo.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Ohio
Strouss	Youngstown, Ohio
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Marshall, Inc.	Woburn, Mass.
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner-Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's	Montgomery, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.

(continued)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporation & Retail Divisions	Location of Headquarter Office or Headquarter Store
Mercantile Stores Co., Inc. (continued)	
Joslin's (Joslin's Dry Goods Co.)	Denver, Colo.
Lion	Toledo, Ohio
McAlpin's	Cincinnati, Ohio & Lexington, Ky.
The People's Store	Tacoma, Wash.
Root's	Terre Haute, Ind.
J.B. White	Augusta, Ga.; Columbia and Greenville, S.C.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Petrie's	Secaucus, N.J.
Stuarts	Secaucus, N.J.
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Calif.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Mass.
Rices Nachmans	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Britts Dept. Store Division	New York, N.Y.
Lerner Stores Corp.	New York, N.Y.
McCrory Stores Division	New York, N.Y.
Supermarkets General Corp.	Woodbridge, N.J.
Hochschild, Kohn & Co.	Baltimore, Md.
Howland-Steinbach	White Plains, N.Y.; Asbury Park, N.J.
U.S. Shoe Corp.	Cincinnati, Ohio
Antics/Ups 'N Downs	Enfield, Conn.
August Max	New York, N.Y.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T.H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
Wickes Companies, Inc.	San Diego, Calif.
Alden's, Inc.	Chicago, Ill.
Gamble Department Stores, Inc.	Chicago, Ill.
Howard Brothers	Monroe, La.
J.M. McDonald (McDonald Dept. Stores)	Hastings, Neb.
Mode O'Day	Burbank, Calif.
Women's World Shops	La Mesa, Calif.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in January, 1983): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DRESSES (WOMEN'S, MISSES' AND JUNIORS') (January, 1983): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manutacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.46

Dresses (Women's, Misses' and Juniors')

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

- MARKET TRENDS.......... 1
- GENERAL STATISTICS ON THE INDUSTRY.......... 1
  - EMPLOYMENT & EARNINGS.......... 3
  - OPERATING RATIOS.......... 4
  - BY REGIONAL LOCATIONS.......... 5
- PRODUCTION.......... 6
  - MATERIALS CONSUMED.......... 7
  - SEASONALITY IN PRODUCTION.......... 8
- SHIPMENTS.......... 8
- PRODUCER PRICE TRENDS.......... 11
- FOREIGN TRADE--IMPORTS.......... 11
- FOREIGN TRADE--EXPORTS.......... 13

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET.......... 14
  - WORKING WOMEN.......... 16
  - SPECIALIZED MARKETS.......... 18
- RETAIL SALES.......... 19
- RETAIL SALES BY TYPE OF OUTLET.......... 20
  - SPECIALTY STORES.......... 20
  - DEPARTMENT STORES.......... 22
- RETAIL ADVERTISING.......... 24
- CONSUMER PRICE TRENDS.......... 24
- CONSUMER BUYING HABITS.......... 24

SCHEDULE OF ADDITIONAL FACT FILES.......... 28

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-428-7

Printed in the United States of America

WOMEN'S, MISSES' & JUNIORS' DRESSES

Market Trends

Dress sales in 1982, according to a consensus of trade sources, ran even or slightly ahead of 1981 sales. Many industry observers feel that this showing, in a generally flat apparel sales year, may signal an upturn in the fortunes of the dress industry.

A 1981 survey found that 20% of women nationwide were actively shopping for a dress, while an additional 79% reported that they were waiting for a dress sale. The surge in the number of working women is one of the major reasons for the optimism of dress manufacturers. Over 47 million women were in the civilian labor force in 1982, with over 28 million employed in white-collar occupations.

Many of the best-selling dress categories in 1982 can be traced to the working women influence. For example, knit dresses, a category which had been dormant since the mid-1970's, showed renewed life. Consumer interest was attributed, in part, to the easy-care properties of knits--a key selling point to the working women with limited time. Contemporary dresses, described as reasonably priced, work-oriented apparel, also sold well in 1982.

Overall, the dress business in 1982 was brisk in the better and upper moderate price points but relatively static in the strictly traditional, moderately-priced area. What seems to excite today's consumer is new looks and fabrics. Styling has become all-important to dress manufacturers. The makers who have captured the public's imagination with their designs have registered sharp sales increases in spite of the recession. From this, the manufacturers conclude that women are willing to buy dresses but want to see something new to entice them.

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

The estimated value of industry shipments (including both primary and secondary products and miscellaneous receipts) from all manufacturers classified in the women's and misses' dress industry in 1981, as reported in the 1982 U.S. Industrial Outlook, was $4.5 billion. This figure was 1.5% higher than the estimated 1980 shipment value of $4.4 billion and only 6.7% larger than the shipment value of $4.2 billion in 1977. Measured in constant 1972 dollars, the value of dress industry shipments has fallen at the compounded annual rate of 1.7% since 1972, according to the Bureau of Industrial Economics.

GENERAL STATISTICS ON THE INDUSTRY

Women's, Misses' & Juniors' Dress Industry (SIC 2335*)

	1981(e)	1980	1979	1978	1977
Number of companies	na	na	na	na	6,753
Number of establishments, total**	na	4,038#	4,198#	3,466#	6,953
Employees, total (thous.)	143.1	176.3	162.8	159.8	175.3
Production workers (thous.)	120.6	152.0	139.8	137.7	153.0
Payroll (mil. $)	na	$1,359.8	$1,218.2	$1,178.4	$1,197.1
Value added by manufacture (mil. $) ***	$2,392.0	$2,472.5	$2,256.0	$2,330.9	$2,233.7
Value of industry shipments (mil. $) ##	$4,471.0	$4,405.6	$4,081.5	$4,371.4	$4,188.6
Capital expenditures, new (mil. $)	na	$ 50.5	$ 38.5	$ 38.1	$ 45.2

*SIC (Standard Industrial Classification) 2335 covers establishments primarily engaged in manufacturing women's, misses', and juniors' dresses of all types, including ensemble dresses and pants dresses, whether sold by the unit or by the dozen (daytime house dresses).

**Each business location is counted as a separate establishment. For 1977, the 6,953 establishments in the dress industry included 4,347 manufacturers (regular or inside factory), 462 jobbers (who arrange with contractors to manufacture for them, the jobber supplying the material), 2,144 contractors (outside factories which process materials owned by others, and do not sell the finished garment).

***Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

#Covers establishments with paid employees only, as reported in County Business Patterns.

##Value of shipments of the dress industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in this industry. Figures on shipments of dresses by all producers, including those classified in other industries, are shown on page 9.

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Annual Survey of Manufactures, 1979, 1980
County Business Patterns, 1978, 1979,
U.S. Industrial Outlook, 1982

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

An average of 128.2 thousand people were employed in the women's and misses' dress industry over the January to September 1982 period, a 7.5% decrease from the average of 138.6 thousand persons in the same 1981 period. Over the same time frame, the number of production workers dropped 8.7% to 111.6 thousand.

After a 10.9% rise in average weekly earnings in 1981 compared with 1980, the growth of production worker wages slowed to a moderate 2.9% increase in the first nine months of 1982 compared with the same 1981 period.

Employment & Earnings in the Dress Industry

	January-September Average			Annual Average		
	1982(p)	1981	% Change 1982/1981	1981	1980	% Change 1981/1980
Women's & misses' dresses (SIC 2335)						
All employees (thous.)	128.2	138.6	- 7.5%	137.1	144.3	- 5.0%
Production workers (thous.)	111.6	122.2	- 8.7	120.7	128.0	- 5.7
Avg. weekly earnings	$168.48	$163.79	+ 2.9	$164.59	$148.37	+ 10.9
Avg. hourly earnings	5.24	5.06	+ 3.6	5.08	4.71	+ 7.9
Avg. weekly hours	32.2	32.4	- 0.6	32.4	31.5	+ 2.9

(p) = preliminary.

Source: U.S. Bureau of Labor Statistics, Employment and Earnings.

In 1980, there were a total of 4,038 establishments with payrolls primarily manufacturing dresses in the U.S., according to the Census Bureau's County Business Patterns report. Nearly 80% of these establishments employed fewer than 50 people while only 6.4% were relatively large plants with 100 persons or more.

The Women's Dress Industry by Employment Size, 1980

	Establishments	
	Number	% of Total
Women's & misses' dresses (SIC 2335)	4,038	100.0%
By establishment size:		
Under 10 employees	1,065	26.4
10-19 employees	808	20.0
20-49 employees	1,341	33.2
50-99 employees	565	14.0
100 or more employees	259	6.4

Source: U.S. Bureau of the Census, County Business Patterns, 1980.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Share of Industry Shipments in Large Plants
In the Women's & Misses' Dress Industry, 1981

	Number of Plants		% of Industry Shipments Accounted for by Plants With 100 or More Employees
	With 20+ Employees	With 100+ Employees	
Women's & misses' dresses (SIC 2335)	1,203	342	63%

Source: Sales & Marketing Management,
"Survey of Industrial Purchasing Power,"
April 1982. All rights reserved.

Operating Ratios

The 50 largest companies engaged in the manufacture of women's and misses' dresses in 1977 accounted for 26% of the $4.1 billion worth of dresses shipped by all U.S. manufacturers that year. In 1977, the total shipment value of unit-priced dresses reached $2.0 billion, 9.3% higher than in 1972. The top 50 manufacturers shipped 44% of the 1977 total.

Concentration Ratios in the Women's & Misses' Dress Industry
& the Washable Service Apparel Industry, 1972, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Women's & misses' dresses					
1977	$ 4,132.8	7%	10%	17%	26%
1972	3,536.2	9	13	18	27
Unit-priced dresses					
1977	1,997.7	10	17	30	44
1972	1,827.7	14	20	29	44
Dozen-priced dresses					
1977	399.1	27	40	63	86
1972	378.2	21	30	49	76
Washable service apparel					
1977	193.2	33	51	82	99
1972	105.2	36	55	82	99

* Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Specified Business Ratios in the Women's Dress Industry, 1980
(Median Results)

	Women's & Misses' Dresses (SIC 2335)
Number of firms reporting	497
Current assets to current debt (times)	1.71
Net profit on net sales (percent)	2.27
Net profits on net worth (percent)	21.79
Net sales to net worth (times)	8.34
Net sales to inventory (times)	11.5
Collection period (days)	41

Source: Dun & Bradstreet, Inc.,
Business Economics Division,
Key Business Ratios 1980,
All rights reserved.

By Regional Location

Leading States in the Women's & Misses' Dress Industry, 1977

	Number of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	20+ Employees		
Women's & misses' dresses, (SIC 2335), U.S. total	6,953	2,473	$ 2,233.7	$ 4,188.6
Leading States:				
New York	2,450	957	837.3	1,792.1
California	1,831	356	369.7	710.7
Pennsylvania	535	365	231.4	337.7
Florida	520	129	101.2	164.6
New Jersey	380	142	102.2	183.8
Texas	200	76	97.9	184.8
Massachusetts	141	79	81.3	144.9
Illinois	73	36	60.9	147.1
Leading states, total	6,130	2,140	1,881.9	3,665.7
Percent of U.S. total	88.2%	86.5%	84.2%	87.5%

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23B.

PRODUCTION

Based on production statistics compiled by the International Ladies' Garment Workers' Union (ILGWU), which includes adjustment for underreporting in U.S. Bureau of Census data, U.S. dress production in 1981 dropped to about half of what it was in 1966. Compared with 1980, dress production in 1981 fell 24.4%.

Trend in U.S. Production of Dresses, 1975-1981
(Index, 1966 = 100)

Year	Index
1975	69.3
1976	66.4
1977	71.1
1978	69.8
1979	67.5
1980	66.0
1981	49.9

Source: Based on reports from the U.S. Bureau of the Census and the ILGWU Research Department.

Annual data on production of major categories of women's wear, based on a sample of manufacturers and jobbers, are compiled in the Current Industrial Reports series issued by the U.S. Bureau of the Census.

Starting with the 1981 annual CIR on women's and children's outerwear, the Census Bureau added a number of manufacturers to the survey. Although their output is included in the 1981 production totals, these firms were not asked to supply data for any previous years. In 1981, the newly-added firms accounted for 12.6% of the reported production of women's dresses and 12.8% of washable service apparel production.

Adjusting the data for comparability with the prior year, 1981 dress production was down a steep 17.8% while the output of washable service apparel declined 5.5%. Comparisons between 1981 and 1980 in terms of wholesale price, fabric type or construction cannot be made due to the difference in coverage.

Production of Women's, Misses' & Juniors' Dresses
& Washable Service Apparel, 1981
(Thousands of Units)

	1981	% Change 1981/1980 (Adjusted)
Women's, misses' & juniors' dresses	165,306	- 17.8%
Washable service apparel	2,728	- 5.5

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear, 1981

U.S. Production of Dresses & Washable Service Apparel by Fabric Construction & Factory (Wholesale) Prices of Dresses, 1981

	Production (Thous. Units) 1981	% of Total
Women's, misses' & juniors' dresses	165,306	100.0%
By price (per unit):		
Under $6.00	9,250	5.6
$6.00 - 9.99	28,806	17.4
$10.00 - 15.99	45,236	27.4
$16.00 & over	50,338	30.4
Price line, n.s.k.	31,676	19.2
By fabric:		
Woven fabric:		
All or chiefly cotton	14,799	8.9
All or chiefly man-made	71,419	43.2
All or chiefly wool	2,094	1.3
All other fabric	2,869	1.7
Knit fabric:		
All or chiefly cotton	2,964	1.8
All or chiefly man-made	37,624	22.8
All or chiefly wool	820	0.5
All other fabrics	123	*
Fabric, n.s.k.	32,594	19.7
Washable service apparel, including uniforms, medical & lab jackets, etc.	2,728	100.0
By construction:		
Woven fabric	1,076	39.4
Knit fabric	998	36.6
Construction, n.s.k.	654	24.0
By fabric:		
All or chiefly cotton	277	10.1
All or chiefly man-made	1,886	69.1
All other fabrics, including fabric, n.s.k.	565	20.7

n.s.k. = not specified by kind.

* Less than 0.1%.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear, 1981.

Materials Consumed

The 1977 census of manufactures reports included information on the delivered cost of fabrics consumed in the production of dresses by plants classified in this industry, as noted below:

(continued)

PRODUCTION

Materials Consumed

Value of Fabrics Used in Dress Production, 1972, 1977
(Delivered Cost in Millions of Dollars)

	1977	1972	% Change 1977/1972
Broad woven fabrics	$331.0	$289.5	+ 14.3%
Purchased knitted fabrics	222.3	427.1	- 47.9%

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Industry Series MC77-1-23B.

Seasonality in Production

In both 1980 and 1981, dress cuttings were highest in March and lowest in December, according to the monthly CIR on women's, misses' and juniors' apparel. The monthly report was discontinued at the end of 1981 due to budget restraints.

Percent of Year's Cuttings of Dresses by Months, 1980, 1981

	1981	1980
Total dress cuttings	100.0%	100.0%
By month		
January	8.3	9.5
February	9.6	10.4
March	11.1	10.8
April	10.0	10.3
May	8.8	8.8
June	8.9	9.2
July	7.5	7.7
August	8.4	7.8
September	8.2	7.1
October	7.3	7.1
November	6.0	5.8
December	5.9	5.5

Source: U.S. Bureau of the Census, Women's, Misses' & Juniors' Apparel, December 1981.

SHIPMENTS

The Annual Survey of Manufactures (ASM) reports issued by the Census Bureau are based on a sample of manufacturers, jobbers and contractors of women's wear and thus provides broader-based information on the value of dress shipments than the Current Industrial Reports series. Differences in the two series also occur due to variations in product classifications and reporting procedures. However, in both the ASM and the CIR the year-to-year trend is considered by the Census Bureau to be more significant than the level of reporting.

For 1981, the Current Industrial Reports series reported that the total shipment value of women's, misses' & juniors' dresses was down 3.8% compared with 1980. Over the same time frame, the shipment value of washable service apparel gained a slight 0.8% in value.

Contract work on women's, misses' & juniors' dresses, not reported in the CIR, totaled $970.2 million in 1980, 8.2% higher than in 1979, according to the ASM report. Overall, dress shipments surpassed $4.2 billion in 1980, a gain of 8.9% over the previous year. Unit-priced dress shipments rose 4.3% in value to almost $2.5 billion in 1981.

Value of Shipments of Dresses & Washable Service Apparel, 1979, 1980

	Value of Shipments (Mil. $)		
	1980	1979	% Change 1980/1979
Women's, misses' & juniors' dresses	$ 4,277.9	$ 3,926.8	+ 8.9%
Unit-price dresses	2,464.1	2,363.2	+ 4.3
Dozen-price dresses	357.3	334.3	+ 6.9
Contract work on women's, misses' & juniors' dresses	970.2	896.7	+ 8.2
Women's, misses' & juniors' dresses, n.s.k.	486.3	332.5	+ 46.3
Women's, misses' & juniors' washable service apparel	205.8	216.8	- 5.1

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures,
Value of Product Shipments
M80(AS)-2.

By Region

Manufacturers of dresses in 4 states--New York, California, Pennsylvania and Texas--accounted for 83.7% of the $2.0 billion worth of unit-priced dresses shipped by U.S. manufacturers in 1977. More than half of the shipments (value) of unit-priced dresses came from New York State plants.

SHIPMENTS

By Region

Value of Shipments of Dresses & Washable Service Apparel By Leading States, 1977

	Value of Shipments (Mil. $)		
	1977	1972	% Change 1977/1972
Women's, misses' & juniors' dresses			
Unit-priced			
U.S. total	$ 1,997.7	$ 1,827.7	+ 9.3%
Leading states:			
New York	1,101.7	910.7	+ 21.0
California	323.4	238.1	+ 35.8
Pennsylvania	134.5	nr	--
Texas	112.9	72.8	+ 55.1
Leading states, total	1,672.5	--	--
Percent of U.S. total	83.7%	--	
Dozen-priced			
U.S. total	399.1	378.2	+ 5.5
Leading states:			
New York	106.2	140.0	- 24.1
Illinois	103.2	48.6	+112.3
California	43.7	nr	--
Leading states, total	253.1	--	--
Percent of U.S. total	63.4%	--	
Contract work on women's, misses' & juniors' dresses, U.S. total	694.5	729.7	- 4.8
Leading states:			
New York	184.6	211.3	- 12.6
Pennsylvania	131.2	153.5	- 14.5
California	66.0	43.6	+ 51.4
New Jersey	45.8	48.2	- 5.0
Florida	35.2	26.5	+ 32.8
Massachusetts	33.5	37.9	- 11.6
Leading states, total	496.3	521.0	- 4.7
Percent of U.S. total	71.5%	71.4%	
Women's, misses' & juniors' washable service apparel, U.S. total	193.2	105.2	+ 83.6
Leading states:			
New York	53.3	28.7	+ 85.7
California	22.8	nr	--
Georgia	22.1	14.1	+ 56.7
Missouri	20.0	nr	--
Tennessee	12.5	nr	--
Leading states, total	130.7	--	--
Percent of U.S. total	67.6	--	

nr = not reported.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-I-23B.

PRODUCER PRICE TRENDS

After a rise of 5.9% for the year 1981 compared with the prior year, producer (or factory) prices for women's unit-priced dresses increased only 2.3% in the January-September 1982 period as against the 1981 average. At the same time, the producer price index for all women's apparel jumped 9.3% in 1981 over 1980 and 4.4% in 1982's first nine months. Price rises of all commodities covered in the Bureau of Labor Statistics slowed to 1.9% over the first three quarters of 1982, after a 9.1% increase in 1981 compared with 1980.

Producer Price Index of Women's Dresses, 1980, 1981
& January-September 1982 Average
(1967=100 unless otherwise indicated)

	January-September 1982	Annual Averages		% Change January-September 1982/ Annual Average 1981
		1981	1980	
All commodities	299.0	293.4	268.8	+ 1.9%
Women's apparel	171.7	164.4	150.4	+ 4.4
Unit-priced dresses (Dec. 1977=100)	124.1	121.3	114.5	+ 2.3

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imported women's and children's dresses were valued at $217.9 million in 1981, up 9.6% over 1980. Of this total, only 25.1%, or $54.7 million, were knit dresses. Dresses of man-made fibers (not knit) represented the largest single category of dress imports. In 1981, these imports were valued at $53.1 million, 34.6% higher than in 1980, while the quantity shipped rose 16.7% to 916.7 thousand dozen. Cotton dresses (not knit) gained 25% in value to $50.4 million on a 26.3% increase in units to 684.5 thousand dozen.

According to the Bureau of Industrial Economics in the 1982 U.S. Industrial Outlook, the value of women's and misses' dress imports reached an estimated $198.1 million in 1981, 30.4% higher than the year before. These imports represented approximately 6.9% of U.S. apparent consumption (domestic shipments plus imports minus exports) of dresses in 1981.

FOREIGN TRADE

Imports

Imports of Women's & Children's Dresses By Leading Countries of Origin, 1980, 1981

(Quantity in thousands of dozens, except where noted)

	Quantity			C.I.F. Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Women's, girls' & infants' dresses, total	na	na	--	$217,877	$198,728	+ 9.6%
Not knit, total	1,743.7	1,430.4	+ 21.9%	163,198	150,500	+ 8.4
Cotton	684.5	541.9	+ 26.3	50,419	40,342	+ 25.0
India	259.3	201.8	+ 28.5	21,675	16,100	+ 34.6
Philippines	72.3	71.0	+ 1.8	1,861	1,910	- 2.6
Pakistan	56.6	33.3	+ 70.0	2,288	1,409	+ 62.4
Wool, not ornamented	5.9	7.3	- 19.2	3,196	2,881	+ 10.9
Hong Kong	2.7	1.7	+ 58.8	885	460	+ 92.4
France	0.9	1.1	- 18.2	794	920	- 13.7
Man-made fibers	916.7	785.2	+ 16.7	53,099	39,455	+ 34.6
Philippines	386.1	367.8	+ 5.0	8,334	6,880	+ 21.1
Hong Kong	104.5	72.6	+ 43.9	14,991	10,661	+ 40.6
Taiwan	77.7	37.8	+105.6	6,102	2,972	+105.3
Silk	136.6	96.0	+ 42.3	56,484	33,911	+ 66.6
Hong Kong	72.2	61.0	+ 18.4	25,887	18,270	+ 41.7
Korea	54.9	26.6	+106.4	19,116	8,156	+134.4
Knit, total	na	na	--	54,679	48,228	+ 13.4
Cotton	94.2	156.5	- 39.8	8,196	10,554	- 22.3
Hong Kong	37.3	84.8	- 56.0	3,759	5,686	- 33.9
Japan	13.0	5.7	+128.1	976	363	+168.9
Wool (quantity in thousands of pounds)	841.3	755.0	+ 11.4	18,267	13,772	+ 32.6
Hong Kong	669.5	676.9	- 1.1	14,157	10,511	+ 34.7
Man-made fibers	401.0	377.8	+ 6.1	28,216	23,902	+ 18.0
Taiwan	193.9	174.3	+ 11.2	12,935	9,491	+ 36.3
Hong Kong	100.9	61.8	+ 63.3	9,030	5,638	+ 60.2

na = not available

* The C.I.F. value (cost, insurance, freight) refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
December 1980, 1981.

FOREIGN TRADE

Exports

In 1981, a total of 1,622 thousand dozen women's and children's dresses valued at $62.8 million were exported by U.S. manufacturers. Compared with 1980 dress exports, the 1981 value was 22.2% higher on a 6.9% increase in the quantity.

The U.S. Bureau of the Census separates women's dress exports from children's dresses only when they are made of either cotton or man-made fibers. Women's dresses made of these materials were valued at $53.7 million in 1981, a 15.4% jump from the previous year, although the number exported rose only slightly (1.4%) to 1,448 thousand dozen.

Women's and misses' dress exports represented about 2.4% of the U.S. dress shipments in 1981, according to the Bureau of Industrial Economics.

Quantity & Value of Exports of Women's Dresses
By Leading Countries of Destination, 1980, 1981

	Quantity (Thous. Doz.)			Value* (Thous.$)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Dresses, total	1,621.9	1,517.6	+ 6.9%	$62,831	$51,426	+ 22.2%
Not knit, total	961.7	1,091.1	- 11.9	41,889	33,534	+ 24.9
Knit, total	660.2	426.5	+ 54.8	20,942	17,892	+ 17.0
Women's dresses, total	1,447.8	1,427.5	+ 1.4	53,742	46,579	+ 15.4
Not knit	842.3	1,018.3	- 17.3	36,840	30,572	+ 20.5
Cotton	123.9	124.7	- 0.6	6,874	5,821	+ 18.1
Mexico	37.9	34.1	+ 11.1	2,103	1,663	+ 26.5
Man-made fibers	718.4	893.6	- 19.6	29,966	24,751	+ 21.1
Canada	228.6	155.7	+ 46.8	5,906	4,459	+ 32.4
Mexico	131.5	428.7	- 69.3	7,312	6,378	+ 14.6
Knit, total	605.5	409.2	+ 48.0	16,902	16,007	+ 5.6
Cotton	87.9	156.8	- 43.9	5,074	7,917	- 35.9
Netherlands Antilles	22.3	41.9	- 46.8	1,617	2,379	- 32.0
Mexico	17.7	37.4	- 52.7	654	1,003	- 34.8
Man-made fibers	517.6	252.4	+105.1	11,828	8,090	+ 46.2
Mexico	376.2	98.4	+282.3	6,223	2,645	+135.3

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Women's Dresses By Leading Countries of Destination, 1980, 1981 (continued)

	Quantity (Thous. Doz.)			Value* (Thous. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Women's, girls' & infants' dresses, total	174.1	90.1	+ 93.2	$9,089	$4,847	+ 87.5%
Not knit, total	119.4	72.8	+ 64.0	5,049	2,962	+ 70.5
Wool	12.7	16.7	- 23.9	1,083	956	+ 13.3
Mexico	4.5	1.5	+200.0	421	173	+143.3
Other materials, excluding cotton, man-made & wool	106.7	56.1	+ 90.2	3,966	2,006	+ 97.7
Haiti	36.7	10.7	+243.0	640	145	+341.4
Knit, total	54.7	17.3	+216.2	4,040	1,885	+114.3
Wool	20.1	3.8	+428.9	2,049	470	+336.0
Netherlands Antilles	10.1	1.4	+621.4	912	178	+412.4
Other materials, excluding cotton, man-made & wool	34.6	13.5	+156.3	1,991	1,415	+ 40.7
Venezuela	9.4	0.9	+944.4	551	126	+337.3

*The export value is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the carrier and also excludes freight, insurance and other charges incurred beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1980, 1981.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

By 1995, according to population projections made by the U.S. Bureau of the Census, there will be approximately 21.1 million women between the ages of 35 and 44, 56% more than in 1981. In 1995, the women in this age bracket will account for 15.8% of all females compared with only 11.5% in 1981.

Another age bracket which is expected to grow at a substantially faster rate than the overall total is women 65 years and older. They will represent 15.4% of the projected total of 133.3 million women in 1995 and, at 20.6 million, is expected to grow 31.2% from 15.7 million in 1981. The Census Bureau expects the number of women of all ages will rise 13.1% during this 14-year time frame.

The median age of women in the population is expected to gradually increase to 36 in 1995 compared with 34.3 years old in 1990 and 31.6 years old in 1981.

THE POTENTIAL MARKET

Female Population of the U.S., 1981 & Projections to 1995*
(In Millions)

	1981	1985	1990	1995	Percent of Female Population 1981	Percent of Female Population 1985	Percent of Female Population 1995
Total, all ages	117.9	122.5	128.2	133.3	100.0%	100.0%	100.0%
Under 15 years	25.0	25.3	26.6	27.7	21.2	20.7	20.8
15 years & older	92.9	97.2	101.6	105.6	78.8	79.3	79.2
15-19 years	10.0	9.0	8.3	8.3	8.5	7.3	6.2
20-24 years	10.8	10.5	9.1	8.4	9.2	8.6	6.3
25-34 years	19.6	20.9	21.6	20.1	16.6	17.1	15.1
35-44 years	13.5	16.2	19.1	21.1	11.5	13.2	15.8
45-54 years	11.6	11.6	13.1	16.1	9.8	9.5	12.1
55-64 years	11.7	11.8	11.2	11.1	9.9	9.6	8.3
65 years & over	15.7	17.2	19.1	20.6	13.3	14.0	15.4
Median age	31.6	32.8	34.3	36.0			

* These are middle-level projections, which assume a fertility rate of 1.9 births per woman, as well as middle-level mortality and immigration rates.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25 Nos. 914,922

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 14 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 47 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Estimated Number of Women 18 Years of Age & Over By Height & Weight, 1982
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	86,063	100.0%	19,537	22.7%	38,251	44.4%	28,251	32.9%
Height:								
5'3" or less	46,991	54.6	14,114	16.4	19,622	22.8	13,254	15.4
5'4" - 5'6"	31,068	36.1	4,992	5.8	14,630	17.0	11,446	13.3
5'7" or more	8,004	9.3	430	0.5	3,959	4.6	3,615	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1982 by age.

Working Women

More than half (52.1%) of the 89.6 million women in the U.S. aged 16 and older were working or actively seeking employment in 1981. The percentage of working women was even higher among women householders with no husband present (60%). Slightly more than half (50.5%) of women with working husbands also were in the labor force, compared with 40.5% in 1970.

In contrast with 1970, when only 45% of females aged 25-34 were members of the work force, by 1981 two-thirds (66.7%) of the women in this age bracket had joined the work force. The percentage of women aged 35-44 either employed or looking for a job in 1981 jumped to 66.8% compared with 51.1% in 1970. Women between the ages of 20 and 24 had the highest labor force participation rate in both 1970 and 1981, 57.7% and 69.6%, respectively.

Participation rates for women over age 55 declined in 1981 versus 1970. In 1981, 41.4% of females aged 55-64 were members of the labor force, less than the 43.0% rate in 1970.

Number of Women Employed in Civilian Labor Force & Participation Rates By Specified Age Groups, 1970, 1981

	1981		1970	
	Number Employed (Mil.)	% of Total	Number Employed (Mil.)	% of Total
Females, 16 years & older	46.7	52.1%	31.5	43.3%
By age group:				
16 & 17 years	1.7	42.5	1.3	34.9
18 & 19 years	2.5	60.9	1.9	53.6
20-24 years	7.4	69.6	4.9	57.7
25-34 years	12.9	66.7	5.7	45.0
35-44 years	9.0	66.8	6.0	51.1
45-54 years	7.1	61.1	6.5	54.4
55-64 years	4.8	41.4	4.1	43.0
65 years & older	1.2	8.0	1.1	9.7
Family householder, no husband present	5.6	60.0	2.3	52.3
Wife of householder	24.8	50.5	18.0	40.5

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Profile of the U.S.: 1981.

There were 28.3 million women working at white-collar jobs in 1981, almost 50% more than in 1972. These women accounted for 65.8% of all employed females in 1981, up from 60.8% nine years earlier. Women employed as either managers and administrators, or professional and technical workers numbered 10.5 million in 1981, a significant 78.0% increase.

THE POTENTIAL MARKET

Working Women

The number of female service workers rose 22.1% to 8.3 million compared with 6.8 million in 1972.

Female Employment by Occupational Group, 1972, 1981

	1981		1972	
	Number (Mil.)	% of Total	Number (Mil.)	% of Total
Employed women, 16 years & older	43.0	100.0%	31.1	100.0%
White-collar workers	28.3	65.8	18.9	60.8
Professional, technical & kindred workers	7.3	17.0	4.5	14.5
Managers & administrators, except farm	3.2	7.4	1.4	4.5
Sales workers	2.9	6.7	2.2	7.1
Clerical & kindred workers	14.9	34.6	10.8	34.7
Blue-collar workers	5.8	13.5	4.8	15.4
Craft & kindred workers	0.8	1.9	0.4	1.3
Operatives, except transport	4.2	9.8	4.0	12.9
Transport equipment operatives	0.3	0.7	0.1	0.3
Laborers, except farm	0.5	1.2	0.3	1.0
Farm workers	0.5	1.2	0.5	1.6
Service workers	8.3	19.3	6.8	21.9
Food service workers	3.1	7.2	2.3	7.4
Protective service workers	0.1	0.2	0.1	0.3
Private household workers	1.0	2.3	1.4	4.5
Other service workers	4.1	9.5	3.1	10.0

Source: U.S. Bureau of the Census,
Current Population Reports,
Population Profile of the U.S.: 1981.

In 1980, the Bureau of Labor Statistics issued three projections of labor force participation rates covering selected years up to 1995. The middle growth rate, the basis of the following table, assumes a 1.8% annual growth in the total labor force from 1979 to 1985 and a 1.0% annual increase from 1985 to 1995. During this period, about two-thirds of labor force growth will be generated by women, according to the report. More than 6 out of every 10 women will be in the labor force in 1995.

THE POTENTIAL MARKET

Working Women

Projections of the Civilian Labor Force Participation Rates For Women, 1985, 1990, 1995 (Middle Growth Rate)

	Participation Rates		
	1985	1990	1995
Females, 16 years & older*	56.5%	59.6%	61.2%
By age group:			
16-19 years	59.8	63.9	66.3
20-24 years	76.5	81.4	85.3
25-34 years	75.1	80.7	83.7
35-44 years	72.9	78.6	81.7
45-54 years	61.7	64.3	66.2
55-64 years	41.6	41.7	42.3
65 years & older	7.7	7.3	6.8

* Population projections of all females 16 & over in these years are Series II projections compiled by the Census Bureau in 1977, based on 1970 census figures.

Source: U.S. Bureau of Labor Statistics
Monthly Labor Review, December 1980.

Specialized Markets

The number of marriages and births in the U.S. foreshadow the relative health of specialized dress markets--bridal gowns and maternity dresses. In 1981, 2.4 million marriages were performed, 1% more than in 1980. Similarly, births were up almost 1% in 1981 to 3.65 million versus 3.61 million the prior year.

June was the favored month for marriages, with 11.8% of the year's total weddings, followed by August, with 10.3%. Births are approximately evenly scattered throughout the year, with July and August (both with 9.0% of the total) and April (with 7.6%) representing the extremes.

Total Marriages & Births in the U.S., 1980, 1981

	Total (Thous.)		% Change	Rate Per 1,000 Population	
	1981*	1980(r)	1981/1980	1981	1980(r)
Marriages	2,438	2,413	+ 1.0%	10.6	10.9
Live births	3,646	3,612	+ 0.9	15.9	15.9

* Provisional
(r) = revised

Source: U.S. Department of Health & Human Services,
Monthly Vital Statistics Report.

THE POTENTIAL MARKET

Specialized Markets

Monthly Pattern in Births & Marriages, 1981

	Births		Marriages	
	Number (Thous.)	% of Total	Number (Thous.)	% of Total
Total	3,646	100.0%	2,438	100.0%
January	302	8.3	135	5.5
February	288	7.9	156	6.4
March	295	8.1	147	6.0
April	279	7.6	198	8.1
May	296	8.1	235	9.6
June	292	8.0	287	11.8
July	327	9.0	237	9.7
August	328	9.0	252	10.3
September	319	8.7	216	8.9
October	321	8.8	204	8.4
November	291	8.0	172	7.0
December	307	8.4	200	8.2

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1982.

RETAIL SALES

The latest official information on women's dress sales is contained in the 1977 Census of Retail Trade reports. Only stores with payrolls were included in the merchandise line reports issued by the Census Bureau, but not all store types which sell dresses were required to break down their sales.

According to the census, retail sales of dresses in the major outlet types reporting sales totaled $5.4 billion. Women's ready-to-wear stores sold $2.6 billion worth of dresses in 1977, 47.4% of the total. Department store dress sales amounted to $2.2 billion, or 40.4%.

Reported Sales of Women's Dresses by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Dress Sales		Reported Dress Sales	
	Number	Percent	Mil. $	Percent
Total	56,036	100.0%	$5,434.9	100.0%
Women's ready-to-wear stores	32,048	57.2	2,574.4	47.4
Department stores**	8,254	14.7	2,213.7	40.7
Family clothing stores	10,862	19.4	489.2	9.0
Mail order houses	3,650	6.5	122.1	2.3
Other apparel stores***	1,222	2.2	35.5	0.6

(footnotes continued)

RETAIL SALES

(footnotes for preceding table)

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within the stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses.

***Includes lingerie shops and other specialized women's apparel outlets, shoe stores, children's wear stores, and stores primarily selling men's wear.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Percent of Total Store Sales Accounted For by Women's Dress Sales In Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Sales Accounted For by Women's Dress Sales
Department stores**	$ 76,909.4	2.9%
Women's ready-to-wear stores	12,250.3	21.0
Family clothing stores	7,883.6	6.2

**See footnote in the preceding table.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Total sales in women's ready-to-wear stores in 1981 exceeded $16.5 billion, 9.7% above their 1980 sales level. Through the first 9 months of 1982, sales were 2.9% higher than the similar 1981 period. The number of women's ready-to-wear stores with payrolls crept up 0.5% in 1980 (the latest year available) to 39,969.

Women's Ready-to-Wear Stores: Total Sales & Number of Stores, 1979-1981

				% Change	
	1981	1980	1979	1981/1980	1981/1979
Total sales (mil. $)	$16,532	$15,074	$14,969	+ 9.7%	+ 10.4%
Number of stores*	na	39,969	39,765	--	--

* Includes only those with payrolls.

Source: Based on U.S. Bureau of the Census,
Revised Monthly Retail Sales & Inventories,
County Business Patterns, 1979, 1980.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Almost 93% of women's ready-to-wear stores with payrolls in the U.S. operated with fewer than 20 employees and almost three-quarters employed less than 10 persons in 1980, according to the Bureau of the Census.

Women's Ready-to-Wear Stores by Employee Size, 1980
(Stores With Payrolls Only)

	Establishments		Employees	
	Number	% of Total	Number	% of Total
Women's ready-to-wear stores, total	39,969	100.0%	349,635	100.0%
By establishment size:				
Under 10 employees	29,226	73.1	127,401	36.4
10-19 employees	7,885	19.7	105,752	30.2
20-49 employees	2,345	5.9	67,118	19.2
50-99 employees	391	1.0	26,265	7.5
100 or more employees	122	0.3	23,099	6.6

Source: U.S. Bureau of the Census, County Business Patterns, 1980.

The December 1981 Christmas season presented women's ready-to-wear stores with 13.2% of store sales for the year. October was the second largest sales month, with 8.9% of dollar sales taking place that month.

Sales of Women's Ready-to-Wear Stores by Month, 1980, 1981

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1981	6.7%	6.1%	7.4%	8.4%	8.0%	7.6%	7.8%	8.6%	8.5%	8.9%	8.8%	13.2%	100.0%
1980	6.7	6.2	7.6	7.9	8.0	7.2	7.5	8.6	8.3	9.1	9.3	13.6	100.0

Source: U. S. Bureau of the Census, Revised Monthly Sales & Inventories.

Dress sales in 38 surveyed specialty stores, each with total sales over $1 million, rose a median 4.0% in 1981 over the 1980 level, slower than the typical 8.3% sales growth rate for the entire store, according to the National Retail Merchants Association. Sales of women's dresses fell a median 1.6% from 1980, while juniors' dress sales gained 2.0% and misses' less than 1%.

On average, dress sales account for 8% of total specialty store sales. Sales per square foot for both women's dresses ($170.30) and misses' dresses ($162.90) were above the store median of $157.30, but juniors' dress sales per square foot were considerably below that mark at $88.80.

RETAIL SALES BY TYPE OF OUTLET

Specialty Stores

Merchandising & Operating Results of Dress Departments In Specialty Stores With Sales Over $1 Million, 1981
(Median Results)

	Total Upstairs Store (48)*	All Adult Female Apparel (47)*	All Dresses (38)*	Women's Dresses (16)*	Misses' Dresses (23)*	Juniors' Dresses (27)*
Net sales, % change from last year	+ 8.3%	+ 6.7%	+ 4.0%	- 1.6%	+ 0.9%	+ 2.0%
Sales, % to total store	100.0	50.7	5.4	3.1	4.9	1.9
Sales, % of adult female apparel	--	100.0	8.0	6.4	10.1	3.8
$ sales per sq. ft. of selling space (main or largest unit)	$157.3	$147.1	$109.2	$170.3	$162.9	$ 88.8
Cumulative markon, %	51.2%	51.8%	51.0%	50.5%	50.6%	51.1%
Gross margin, % of net sales, including cash discounts	43.3	43.0	41.0	41.9	39.6	41.9
Markdowns, % of net sales, including employee discounts	18.3	20.9	25.5	23.8	28.0	25.8
Number of stock turns (times)	3.1	3.5	3.6	3.2	3.6	4.2

*Number in parentheses refers to the number of reporting stores in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981.

Department Stores

Among surveyed department stores with sales in excess of $1 million, overall 1981 dress sales declined a median 1.2% compared with 1980. However, women's dress sales (+2.3%) and misses' dress sales (+0.9%) managed to post small gains, but these were lower than the median 6.7% sales increase in the entire upstairs store. On a median sales basis, declines were reported for juniors' dresses (-0.9%), bridal and formal dresses (-3.5%), utility dresses (-4.3%) and maternity clothing (-5.6%).

At a typical 3.3 stock turns per year, dresses outperformed the median number of stock turns in the total upstairs store (2.7 times). Juniors' dresses had the highest number of stock turns, 4.2, and bridal and formal dresses turned the slowest of the dress categories, 2.1 times.

RETAIL SALES BY TYPE OF OUTLET

Department Stores

Merchandising & Operating Results of Dress Departments in Department Stores With Sales Over $1 Million, 1981
(Median Results)

	Total Upstairs Store (117)*	All Adult Female Apparel (113)*	All Dresses (110)*	Women's Dresses (78)*	Misses' Dresses (82)*
Net sales, % change from last year	+ 6.7%	+ 8.8%	- 1.2%	+ 2.3%	+ 0.9%
Sales, % to total store	90.1	24.5	3.1	0.4	3.0
Sales, % of adult female apparel	--	100.0	7.5	1.7	12.0
$ sales per sq. ft. of selling space (main or largest unit)	$111.8	$129.2	$ 94.9	$104.0	$113.8
Cumulative markon, %	48.2%	50.8%	50.3%	50.7%	50.5%
Gross margin, % of net sales, including cash discounts	42.0	43.0	39.2	42.2	38.6
Markdowns, % of net sales, including employee discounts	13.0	20.9	25.9	23.5	27.6
Number of stock turns (times)	2.7	3.8	3.3	3.3	3.4

	Juniors' Dresses (95)*	Bridal/ Formal Dresses (45)*	Utility Dresses, Aprons & Uniforms (18)*	Maternity Clothing & Accessories (53)*
Net sales, % change from last year	- 0.9%	- 3.5%	- 4.3%	- 5.6%
Sales, % to total store	0.8	0.2	1.1	0.1
Sales, % of adult female apparel	3.2	0.9	5.0	0.6
$ sales per sq. ft. of selling space (main or largest unit)	$ 98.9	$ 82.1	$87.0	$ 91.8
Cumulative markon, %	51.2%	49.6%	50.5%	51.6%
Gross margin, % of net sales, including cash discounts	42.2	38.2	45.0	47.5
Markdowns, % of net sales, including employee discounts	23.7	16.4	18.4	15.9
Number of stock turns (times)	4.2	2.1	3.5	2.9

* Number of reporting stores.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981.

RETAIL ADVERTISING

Women's dresses were most heavily advertised in April during 1981, according to the Advertising Checking Bureau, which monitors newspaper advertising. Only 4.9% of the year's advertising for dresses was placed in January, the smallest of any month.

Percent of Year's Total Retailers' Newspaper Ad Linage
Done Each Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Women's dresses	4.9%	7.2%	10.1%	12.6%	10.6%	8.3%	5.5%	8.7%	9.2%	8.5%	7.8%	6.6%	100.0%

Source: Advertising Checking Bureau, Neustadt Reports Div., based on newspaper ad linage in 7 major cities.

CONSUMER PRICE TRENDS

The average consumer price index for unit-priced dresses during the January-September 1982 period fell 2.3% compared with the annual 1981 average. Over the same period, women's apparel rose a small 1%, and the overall index was only 5.6% higher.

Consumer Price Index of Women's Dresses, 1980, 1981
& January-September 1982 Average
(1967=100 unless otherwise indicated)

	January-September 1982	Annual Averages 1981	Annual Averages 1980	% Change January-September, 1982/ Annual Average 1981
All items	287.6	272.4	246.8	+ 5.6%
Women's apparel (Dec. 1977=100)	105.4	104.3	103.1	+ 1.0
Unit-priced dresses	160.4	164.2	164.1	- 2.3

CONSUMER BUYING HABITS

The following tables on women's dress purchases have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

In a typical month, 11.4% of NPD households buy dresses, suits, skirts and/or blazers. More households (15.2%) purchased these items in April than any other month.

Percent of Households Purchasing Dresses by Month, 1981

	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Dresses, suits, skirts & blazers	9.7%	8.3%	9.6%	15.2%	13.2%	12.7%	13.0%	12.3%	10.6%	10.8%	9.7%	12.1%

Source: National Panel Diary, quoted in
1983 Newspaper Advertising Planbook,
Newspaper Advertising Bureau.

In the twelve-month period ended June 1982, specialty stores held a 38.4% share of dollars spent on dresses and 30.1% of dress unit sales. Department stores were the next most popular outlet for dress purchases. They accounted for 32.8% of dollars spent and 26.5% of units purchased by NPD panel members over this period.

Percent of Women's Dress Purchases by Outlet Type 1980, 1981 & July 1981-June 1982

	Units			Dollars		
	July 1981-June 1982	1981	1980	July 1981-June 1982	1981	1980
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	26.5	26.0	27.4	32.8	32.2	31.6
National chains	16.4	17.6	18.4	11.5	12.6	13.5
Specialty stores	30.1	29.5	30.2	38.4	38.4	38.7
Discount stores	18.0	17.5	14.9	10.2	9.8	8.6
All other retailers, including mail order	9.0	9.4	9.1	7.1	7.0	7.6

Source: NPD Research

Over a third (34.2%) of all dresses purchased by panel members between July 1981 and June 1982 retailed for at least $10 but less than $20. In terms of dollars, the $10-$19.99 bracket accounted for 20.4% of total spending for dresses in the period, slightly lower than in 1981 (20.6%) and an almost 2 point drop from 1980 (22.3%).

The $20-29.99 price range garnered 19.8% of total dress spending and 20.6% of unit dress sales in the twelve month period ended June 1982. For the full year 1981, dress sales in the $20-$29 range equaled 20.6% of dollars and 20.5% of units.

Dresses which retail for $80 and over accounted for an increasingly larger share of dollars spent from 1980 to June 1982. In the year ended June 1982, this category held a 13.7% share of total dress spending compared with an 11.1% share in 1981 and a 9.0% share for the year 1980.

Percent of Women's Dress Purchases by Price Points
1980, 1981 & July 1981-June 1982

	Units			Dollars		
	July 1981-June 1982	1981	1980	July 1981-June 1982	1981	1980
Total women's dress purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
By retail price points:						
Less than $10	18.8	21.1	19.8	4.7	5.6	5.5
$10 - 19.99	34.2	33.1	34.8	20.4	20.6	22.3
$20 - 29.99	20.6	20.5	20.9	19.8	20.6	21.4
$30 - 39.99	10.9	10.6	10.5	14.8	15.1	15.1
$40 - 49.99	5.5	5.7	6.0	9.7	10.4	11.2
$50 - 79.99	7.0	6.7	6.2	17.0	16.7	15.6
$80 & over	2.9	2.3	1.8	13.7	11.1	9.0

Close to half (49.6%) of unit sales of dresses in 1981 took place between April and July. June was the singular most popular month in which to buy a dress, with 13.8% of all dresses sold in this month.

Percent Distribution of Women's Dress Purchases by Months, 1980, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units													
1981	5.0%	6.1%	7.8%	12.3%	13.0%	13.8%	10.5%	8.6%	6.5%	5.2%	5.2%	6.0%	100.0%
1980	5.0	5.9	8.6	11.0	12.5	10.5	12.9	9.0	6.3	5.9	6.0	6.4	100.0
Dollars													
1981	4.8	5.3	8.6	12.4	12.8	12.0	8.7	8.5	7.6	5.7	6.4	7.2	100.0
1980	4.8	5.2	8.5	11.7	12.3	9.5	10.7	8.3	7.2	7.7	6.7	7.4	100.0

Source of above tables: NPD Research

Seventeen Magazine's spring apparel buying survey, conducted annually for the magazine, obtained 1981 purchase information from 1,010 teen girls from Seventeen's 2,000-member Consumer Panel, which represents a cross-section of the female teenage market.

Based on the actual number of dresses purchased by respondents, a projected number of over 30 million dresses, worth an estimated $1.2 billion at retail, were bought by a total of 11.7 million teenage girls in 1981.

Dress Purchases by Teenage Females, 1981
(Projected to Total Teenage Market)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
School			
Below knee-length	4,812	6,672	$ 206,565
Knee-length	3,699	8,134	244,996

(continued)

Dress Purchases by Teenage Females, 1981
(Projected to Total Teenage Market)
(continued)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Dresses			
Date			
Below knee-length	3,763	4,399	$ 163,554
Knee-length	2,712	5,521	227,299
Ankle-length	173	180	6,886
Formal gowns	4,144	4,172	289,662
Jumpers	940	1,078	23,748
Projected totals	11,693	30,156	1,162,710

At the time the survey was conducted (May 1982), 63.2% of the respondents favored a skirt length just below the knee. Only 19.5% expect that this length will remain their favorite a year later. Teenagers with no preference as to skirt length will rise from 9.7% of respondents in 1982 to an anticipated 27.8% next year.

Current & Year-From-Now Favorite Skirt Length

	Current Favorite	Year-From-Now Favorite
Skirt lengths		
Just below the knee	63.2%	19.5%
At the knee	12.7	14.0
Any and all lengths	9.7	27.8
Midi	7.7	12.9
Just above the knee	5.4	23.5
Ankle-length	1.3	22.3

Source: Seventeen Magazine
"1982 Spring Apparel Study."

More than 6 out of 10 respondents usually shop in department stores for dresses while 39.9% usually shop in boutiques and specialty stores.

Usual Place of Purchase of Dresses, 1981

	% of Respondents*
Department store	61.6%
Boutique/specialty store	39.7
Discount store	4.7
Variety store	3.8
Mail order	4.4
Other	2.8

* Total adds to more than 100.0% due to multiple mentions.

Source: Seventeen Magazine
"1982 Spring Apparel Study."

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS (1981 Edition available now -- 1982 Edition will be available in February, 1983): Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.47

Consumer Market Developments

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

CURRENT TRENDS 1
POPULATION TRENDS 2
  BIRTHS 2
  TOTAL POPULATION 5
  STRUCTURE OF THE POPULATION BY AGE, SEX, RACE & SPANISH ORIGIN 6
  PROJECTIONS OF THE U.S. POPULATION 8
  METROPOLITAN VS. NON-METROPOLITAN AREA POPULATION 9
  POPULATION BY REGIONS & STATES 11
  REGIONAL PROJECTIONS 13
  MOBILITY 15
MARRIAGES & MARITAL STATUS 16
HOUSEHOLDS & FAMILIES 18
LIVING ARRANGEMENTS 20
SCHOOL ENROLLMENT 22
EDUCATIONAL ATTAINMENT 24
LABOR FORCE, EMPLOYMENT & EARNINGS 26
  UNEMPLOYMENT 29
  EMPLOYMENT BY INDUSTRY & OCCUPATION 31
  EMPLOYMENT BY INDUSTRY & OCCUPATION, BY SEX 32
  FULL-TIME & PART-TIME WORKERS 35
  EARNINGS 35
INCOME 39
  PERSONAL 39
  HOUSEHOLD 44
CONSUMER PRICES 48
CONSUMER CREDIT 49
PERSONAL CONSUMPTION EXPENDITURES 51
RETAIL SALES 54

SCHEDULE OF ADDITIONAL FACT FILES 57

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1982 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-427-9

Printed in the United States of America

CONSUMER MARKET DEVELOPMENTS

Current Trends

At the start of 1983 the U.S. economy registered signs of a mild recovery from the deep recession which got underway in July 1981. Most economists, however, look for a generally slow pickup in activity, which will be greatly affected by developments in interest rates and in unemployment.

In January, the President's Council of Economic Advisors forecast a 1.4% real growth rate in the economy for the year 1983 over 1982. A subsequent Conference Board analysis, however, anticipates a better rate. Expectations of generally better economic conditions in 1983 are based on the relaxing of monetary policy, bringing lower interest rates and growth in the money supply. The restrictive monetary policy in 1982 slowed inflation dramatically, a positive development that year. The outlook now is for inflation to stay down, leading to some growth in disposable income and consumers' disposition to spend.

However, there is no doubt that the recession continues to have an impact across the country, stifling growth in such previously fast-growing areas as the Southwest and Rocky Mountains and industrialized areas. Beyond the recession are deep-seated problems involving the ability of many U.S. industries to compete and to survive under the pressures of foreign competition and loss of markets.

Some private economic forecasts are somewhat more optimistic than that of government sources, but all see the key to recovery in lower interest rates. The Conference Board's Economic Forum projects an annual growth of 7.7% in the Gross National Product in terms of current dollars; 2.7% in real terms in 1983. Inflation is expected to rise by 4.8%. (The 1982 rate was 3.9%.) An unemployment rate averaging 9.8% is anticipated by this source; and the rate is expected to remain high through 1984.

The Board forecasts a rise of about 8.2% in current dollars in personal consumption spending, up from 6.8% in 1982. In real terms, a rise of 3.5% is anticipated for 1983, up from 2.5% in 1982. The Citibank Economic Forecasting Service looks for real consumer outlays to rise at an annual rate of about 4% in the first half of 1983, 3% in the second half. Spending may rise somewhat faster than personal income, resulting in a decline in the savings rate.

It is expected that personal income will rise only moderately in 1983, reflecting a relatively low rate of wage increases, a lower increase in unemployment payments and other transfer payments, and a lower rate of increase in interest income. The 10% personal income tax set for July 1 is expected at this time to go through on schedule, however, and according to a Goldman, Sachs & Co. analysis, consumers' wealth and liquidity is increasing, along with their ability to incur debt.

Declining interest rates and less inflation will tempt consumers to use their borrowing potential to buy durables. Spending for cars, for houses, and appliances, will lead in the recovery, just as the downturn in this sector led the way in the recession. The pent-up demand for these products will make them do better than soft goods. Apparel and other soft goods may not benefit from increases in spending until 1984.

CONSUMER MARKET DEVELOPMENTS

Current Trends (continued)

There is a lack of agreement on the level of activity in clothing and footwear in 1983. Wharton Econometrics looks for a growth of about 1.4% in consumer spending, followed by a 6.5% rise in 1984. Chase Econometrics forecasts a 2.2% annual growth in apparel and footwear sales this year, increasing to 3.9% in 1984, with women's wear outperforming men's. The Citibank Economic Forecast Service year-end outlook anticipates that apparel and footwear spending will rise from $84.3 billion (1972 dollars) last year to $87.5 billion in 1983 (a gain of 3.8%).

Projections on the movement of key economic indicators affecting consumer markets in 1983 have been compiled by Morgan Guaranty Trust Company of New York as follows:

Economic Projections
(Percent change at annual rate from previous quarter, except where noted)

	1982	1983			
	Q4	Q1	Q2	Q3	Q4
Real Gross National Product	- 2.2%	+ 2.9%	+ 2.7%	+ 4.2%	+ 4.9%
Real consumer spending	+ 2.3	+ 2.8	+ 2.4	+ 3.8	+ 4.3
Real business-capital outlays	- 11.1	- 9.4	+ 0.2	+ 3.0	+ 4.5
GNP delator	+ 5.3	+ 4.5	+ 5.1	+ 4.5	+ 5.0
Consumer prices	+ 2.9	+ 2.7	+ 5.6	+ 5.8	+ 5.6
Real disposable personal income	- 1.6	+ 2.7	0	+ 4.4	+ 4.2
Saving rate (%)	6.1%	6.1%	5.5%	5.7%	5.7%
Housing starts (millions)	1.3	1.4	1.5	1.6	1.6
Auto sales (millions)	8.6	8.8	8.9	9.4	9.7
Unemployment rate (%)	10.7%	11.0%	11.2%	11.3%	11.3%

Source: The Morgan Guaranty Survey, January 1983.

POPULATION TRENDS

Births

After reaching a record low in 1976, the U.S. birth rate has inched up. In 1982 the total of reported live births (some 3.7 million) was the highest since the year 1970 (over 3.7 million). The reason is obvious--women who are part of the baby boom period (1947-1964) now constitute a record number of young women in prime child-bearing age groups.

In 1960 the U.S. had 36 million women of child-bearing age; in 1980 almost 52 million were in that category. But the birth total now is considerably less than it would have been if the 1960 pattern had been repeated. In that year 4.3 million babies were born. More married women are remaining childless; more women are single or divorced without children.

Demographers are not in general agreement on the future course of the U.S. birth rate, although the Census Bureau forecasts indicate the high point is still five years away. Despite the upward creep in fertility rates and in births in the past few years, an analysis of birth expectations among American women by the

Births (continued)

Census Bureau in 1980 (published in 1982)--the most recent in a series compiled since 1976--showed no change in regard to number of children they planned to have, which averages two. But the actual number in recent years have hovered at between 1.76 and 1.88 babies during a lifetime as opposed to 3.7 in the Forties and Fifties. (The level required for the natural replacement of the population is 2.1 babies.)

As women have postponed marriage and/or become locked into jobs, child-bearing has frequently been postponed, or the decision made to not have children at all. These appear to be firmly entrenched characteristics that do not presage dramatic changes in current birth statistics.

Detailed information on the demographic characteristics of the women who are having children, and those that are not, have been published by the Census Bureau based on the Current Population Survey for June 1980. (Population Characteristics, Series P-20, No. 375, issued in 1982).

Of women 18 to 44 years of age, 70% were childless. Among employed women 18 to 44, the figure rose to 81%, compared with 47.3% among women not in the labor force. Typical child-bearing patterns: rates were highest for women in their twenties, dropping sharply with increasing age; the fertility rate for Hispanics was higher than that for whites or blacks; fertility rates were highest in the West and lowest in the Northwest; it was highest among women who had the least education and among those not in the labor force. Fertility also has a direct relationship to income. The lower the family income, the higher the fertility.

A Census Bureau analysis covering 1981 (Population Profile of the U.S., Series P-20, 374) indicated that among ever-married women 25 to 29 years old, 25% were childless in 1981 compared with 16% in 1970. For women 30 to 44 the figure increased from 8% to 14%.

In 1981, all women 18 to 24 years old expected an average of 2.0 lifetime births. For currently married women 18 to 24 in 1981, this figure was 2.2, virtually unchanged since 1974. However, as previously noted the number of children actually born has averaged below expectations.

First births, which provide a major share of the market for infants' wear and supplies of all types, account for most of the birth total. A rise in births among older women has been a major trend, as women who had delayed marriage or child-bearing to pursue careers decide to start families.

However, the reduced rate of growth in the number of women in age groups where the child-bearing rates are the highest, 20-24 and 25-29 years of age, in coming years is a major factor in the outlook for smaller increases in the number of births.

The number of live births has increased each year since 1975. The reported 1981 total, 3,646,000 was the highest since 1970 when there were 3,731,000 live births.

Births (continued)

The birth rate remained stable at 15.9 live births per 1,000 population in 1980 and 1981, which was the highest rate since 1971 when it reached 17.2 per 1,000.

Provisional data for the first 10 months of 1982 indicate a rise of 1.2% in the number of births compared with the same period of 1981. The birth rate for the January through October 1982 period was 16.0, matching the rate in the same period of 1981. The fertility rate was 67.9 live births per 1,000 women ages 15-44, virtually unchanged from the rate of 68.0 for the first 10 months of 1981.

Live Births in the U.S., Birth Rates & Fertility Rates, 1971-1981

	Number (thous.)				Birth Rate*				Fertility Rate**			
	All Races	White	All Other		All Races	White	All Other		All Races	White	All Other	
Year			Total	Black			Total	Black			Total	Black
1981(p)	3,646.0	na	na	na	15.9	na	na	na	67.6	68.5	na	81.3
1980	3,612.3	2,898.7	713.5	589.6	15.9	14.9	22.5	22.1	68.4	64.7	88.6	88.1
1979	3,494.4	2,808.4	686.0	577.9	15.6	14.5	22.2	22.0	67.2	63.4	88.5	88.3
1978	3,333.3	2,681.1	652.2	551.5	15.0	14.0	21.6	21.3	65.5	61.7	87.0	86.7
1977	3,326.6	2,691.1	635.6	544.2	15.1	14.1	21.6	21.4	66.8	63.2	87.7	88.1
1976	3,167.8	2,567.6	600.2	514.2	14.6	13.6	20.8	20.5	65.0	61.5	85.8	85.8
1975	3,144.2	2,552.0	592.2	511.6	14.6	13.6	21.0	20.7	66.0	62.5	87.7	87.9
1974	3,160.0	2,575.8	584.1	507.2	14.8	13.9	21.2	20.8	67.8	64.3	89.8	89.7
1973	3,137.0	2,551.0	585.9	512.6	14.8	13.8	21.7	21.4	68.8	64.9	93.4	93.6
1972	3,258.4	2,655.5	602.8	531.3	15.6	14.5	22.8	22.5	73.1	68.9	99.5	99.9
1971	3,556.0	2,919.7	636.2	565.0	17.2	16.1	24.6	24.4	81.6	77.3	109.1	109.7

na = not available
(p) = provisional
*Live births per 1,000 population
**Live births per 1,000 women 15-44 years of age.

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics.
Monthly Vital Statistics Report.

There were close to 660,000 births among unmarried women in 1980, 11.4% more than in 1979, setting a new high. Nearly one-third of the increase, however, was due to a change in the method of compilation of the figures. If this is taken into account the total falls to 645,000, representing an increase of 7.4%.

As women have become involved with careers there has been a growing tendency to postpone having children. This trend has continued, although the latest statistics on births by age of mother available currently are for the year 1980.

Births (continued)

Distribution of Births by Age of Mother, 1978-1980

	1980	1979	1978
Total births	100.0%	100.0%	100.0%
Age of mother:			
Under 20 years	15.6	16.0	16.6
20 - 24 years	33.9	34.0	34.2
25 - 29 years	30.7	30.6	30.5
30 - 35 years	15.2	14.8	14.2
35 & older	4.6	4.6	4.5

Source: National Center for Health Statistics, Monthly Vital Statistics Report.

More than 40% of the live births recorded in 1980 were first births (which account for a disproportionate share of the infants' wear market). Second births accounted for 31.7%; third, 14.9%; fourth or higher, 10.6%.

A consistent monthly pattern in births has been observed for many years. The peaks fall in August and in September.

Total Population

The total resident population of the U.S. on July 1, 1982 rose 0.7% over 1981, reaching 231,479,000. The civilian portion of the population represented 99.3% of the total compared with 98.6% on July 1, 1970.

Estimated Population of the U.S.
(In Thousands)

Date	Total Population Including Armed Forces Overseas	Resident Population	Civilian Population
July 1, 1982	231,990	231,479	229,805
July 1, 1981	229,807	229,307	227,659
July 1, 1980	226,658	227,156	225,552
July 1, 1979	225,055	224,567	222,969
July 1, 1975	215,973	215,465	213,788
July 1, 1970	205,052	203,984	201,131

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25

POPULATION TRENDS

Age, Sex, Race & Spanish Origin

As in the 1970's, the population in the prime household-forming ages (25 to 34) and the elderly population (65 years and over) has continued to register the fastest growth. After declining in the 1970's, the number of persons under age 15 has leveled off since 1980, although the share of the total population represented by this group reached its lowest level in U.S. records (22.3%) in 1981.

The elderly population, on the other hand, has increased to a peak proportion of the total (11.4%), and the median age of the U.S. population, 30.3 years, equaled the previous high level attained in 1952 before the peak of the baby boom.

The complete census of the U.S. population, covering the year 1980, showed a wide range in age structure among the States. Compared with the national median age figure of 30.0, on a State basis the median ranged from a low of 24.2 in Utah to 34.7 in Florida, reflecting high fertility and the immigration of retirees, respectively. Several industrial states in the Northeast had median ages of about 32. The proportion of elderly ranged from 2.9% in Alaska to 17% in Florida.

In 1980 minority-group populations had regional distributions quite different from that of the total population. Slightly over one-half of the black population lived in the South. The West had more Hispanics, Asian and Pacific Islanders, and American Indians, than did the North or South.

Race & Spanish Origin of the Resident Population of the U.S.
April 1, 1970 & 1980

	Number (000)		% Distribution	
	1980	1970	1980	1970
Total	226,505	203,212	100.0%	100.0%
White	188,341	177,749	83.2	87.5
Black	26,488	22,580	11.7	11.1
American Indian, Eskimo, Aleut	1,418	827	0.6	0.4
Asian & Pacific Islander	3,501	1,539	1.5	0.8
Other races	6,757	517	3.0	0.3
Persons of Spanish Origin*	14,606	9,073	6.4	4.5

*Persons of Spanish origin may be of any race. In the 1980 Census 86% of the 6,757,000 persons of other races were identified as Spanish in the separate origin questionnaire. In 1980, 56% of the persons of Spanish origin were classified as white compared with 93% in 1970.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

Age, Sex, Race & Spanish Origin (continued)

Distribution of the Resident Population
By Age & by Sex, 1970, 1981

	Number (000) (July 1)		% Distribution		% Change
	1981	1970	1981	1970	1981/1970
Total all ages	229,307	203,984	100.0%	100.0%	+ 12.4%
Under 5 years	16,939	17,166	7.4	8.4	- 1.3
5 to 9 years	16,045	19,919	7.0	9.8	- 19.4
10 to 14 years	18,241	20,853	8.0	10.2	- 12.5
15 to 24 years	42,109	35,810	18.4	17.6	+ 17.6
25 to 34 years	38,804	25,109	16.9	12.3	+ 54.5
35 to 44 years	26,450	23,040	11.5	11.3	+ 14.8
45 to 54 years	22,530	23,299	9.8	11.4	- 3.3
55 to 64 years	21,835	21,167	9.5	10.4	+ 3.1
65 & over	26,253	20,107	11.4	9.9	+ 30.6
Median age	30.3	28.0			
Male population, total	111,423	99,291	100.0	100.0	+ 12.2
Under 5 years	8,667	8,751	7.7	8.8	- 1.0
5 to 9 years	8,204	10,152	7.4	10.2	- 19.2
10 to 14 years	9,321	10,622	8.4	10.7	- 12.2
15 to 24 years	21,277	17,748	19.1	17.9	+ 19.9
25 to 34 years	19,268	12,324	17.3	12.4	+ 56.3
35 to 44 years	12,983	11,212	11.7	11.3	+ 15.8
45 to 54 years	10,888	11,236	9.8	11.3	- 3.1
55 to 64 years	10,256	10,155	9.2	10.2	+ 1.0
65 & over	10,560	8,413	9.5	8.5	+ 25.5
Median age	29.1	26.8			
Female population, total	117,884	104,692	100.0	100.0	+ 12.6
Under 5 years	8,272	8,415	7.0	8.0	- 1.7
5 to 9 years	7,841	9,768	6.7	9.3	- 19.7
10 to 14 years	8,921	10,230	7.6	9.8	- 12.8
15 to 24 years	20,833	18,061	17.7	17.3	+ 15.3
25 to 34 years	19,535	12,785	16.6	12.2	+ 52.8
35 to 44 years	13,467	11,827	11.4	11.3	+ 13.9
45 to 54 years	11,642	12,063	9.9	11.5	- 3.5
55 to 64 years	11,679	11,011	9.9	10.5	+ 6.1
65 & over	15,693	11,693	13.3	11.2	+ 34.2
Median age	31.6	29.2			

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 917.

Note: For detailed information on the "baby boom generation," see the MARKET PACESETTERS FACT FILE (1981).

POPULATION TRENDS

Projections of the U.S. Population

In October 1982 the U.S. Census Bureau issued an advance report covering a new series of projections on the U.S. population by age, race and sex for 1982 to 2050, based on July 1, 1981 population estimates. The three series are derived from alternative assumptions on fertility, mortality and net immigration levels. Projections for the year 1985, for example, range from a low of 237,366,000 for the total population to a high of 240,364,000.

The following information is the "middle" series, reflecting the middle assumptions on future developments in the three components, and looking to a population totaling 238,648,000 by 1985.

Projections of the U.S. Population by Age 1982-2000 (Middle Series)
(Numbers in millions. Includes Armed Forces overseas)

Year	Total	Under 5 Years	5-14	15-19	20-24	25-34	35-44	45-54	55-64	65+	Median Age
1982	232.0	17.4	34.0	19.8	21.9	39.5	28.1	22.3	22.1	26.8	30.6
1983	234.2	17.8	33.7	19.2	21.8	40.2	29.4	22.3	22.2	27.4	30.9
1985	238.6	18.5	33.4	18.4	21.3	41.8	32.0	22.5	22.2	28.7	31.5
1990	249.7	19.2	35.4	17.0	18.6	43.5	37.8	25.4	21.1	31.8	33.0
1995	259.6	18.6	38.1	16.9	17.1	40.5	42.0	31.4	20.9	34.0	34.7
2000	268.0	17.6	38.3	18.9	17.1	36.4	43.7	37.1	23.8	35.0	36.3

Percentage Distribution

Year	Total	Under 5 Years	5-14	15-19	20-24	25-34	35-44	45-54	55-64	65+
1982	100.0	7.5	14.7	8.5	9.4	17.0	12.1	9.6	9.5	11.6
1983	100.0	7.6	14.4	8.2	9.3	17.2	12.6	9.5	9.5	11.7
1985	100.0	7.8	14.0	7.7	8.9	17.5	13.4	9.4	9.3	12.0
1990	100.0	7.7	14.2	6.8	7.5	17.4	15.1	10.2	8.4	12.7
1995	100.0	7.2	14.7	6.5	6.6	15.6	16.2	12.1	8.0	13.1
2000	100.0	6.6	14.3	7.0	6.4	13.6	16.3	13.8	8.9	13.1

Population Projections For Selected Years by Sex/Age Group
(In Thousands)

	Males			Females		
	1983	1985	1990	1983	1985	1990
Total	113,977	116,124	121,498	120,216	122,525	128,234
Age Groups						
Under 5 years	9,133	9,453	9,831	8,713	9,009	9,369
5 to 14	17,232	17,068	18,095	16,471	16,311	17,280
15 to 19	9,773	9,390	8,663	9,393	9,015	8,294
20 to 24	11,082	10,800	9,433	10,770	10,482	9,134
25 to 44	34,583	36,680	40,594	35,095	37,099	40,758
45 & over	32,174	32,733	34,882	39,775	40,609	43,399

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-25, No. 922,
(Advance report issued October 1982).

Projections of the U.S. Population (continued)

The changing components of population growth expected in coming years will lead to marked changes in the age and race distribution of the population over the next 70 years. Among the significant developments envisioned in the "middle" projections are the following:

- The percentage of the population aged 65 and over would rise from 11.4% in 1981 to 13.1% in the year 2000 and 21.7% in 2050.
- The population of primary-school age (5 to 13 years) would decrease from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.
- The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990 before increasing to 15.4 million in 2000.
- The population of 18-and-19 year olds, the prime group entering the labor force, college, and the Armed Forces, would decline from 8.5 million in 1981 to 6.5 million in 1995 before rising slowly to 7.5 million in 2000.
- The population of young adults aged 25 to 34 would increase briefly from 39 million in 1981 to 44 million in 1990 before declining to 36 million in 2000.
- Overall, the U.S. population would grow older, with the median age increasing from 30.3 years in 1981 to 36.3 years in 2000 and 41.6 years in 2050.

The advance report, on which the above figures are based, includes details for single years of age. This report is to be followed by a more detailed report which might include slight revisions in the projected numbers.

Metropolitan Vs. Non-Metropolitan Area

Results of the 1980 population census confirmed a striking tendency toward population deconcentration in the U.S. and a marked shift in migration patterns between metropolitan and non-metropolitan areas. According to John F. Long, chief of the Population Projections Branch of the Census Bureau's Population Division, the greatest growth trends are noted in the most remote category of non-metropolitan counties, with the result that distinctions between metropolitan and non-metropolitan areas are becoming blurred.

Suburbanization not only continued during the 1970's but extended its reach, while many central cities lost population during the decade, particularly in the largest metropolitan areas. Now non-metropolitan areas are growing almost as fast as suburbs. The deconcentration trend, according to Long, should continue for at least another decade or two--which means the relatively empty areas of the South and West will continue to fill with people, the big cities will continue to lose people, the suburbs and extended suburbs will keep growing, and towns and small cities outside of metropolitan areas will become increasingly metropolitan in character.

Metropolitan Vs. Non-Metropolitan Area (continued)

The shift to the suburbs has been particularly strong among blacks and persons of Spanish origin. In areas within metropolitan areas but outside of the central cities the black population rose almost 43% from 1970 to 1980; the Spanish origin population, 81%. This compares with a 13% rise in the white suburban population.

Percent Increase in Metropolitan & Non-Metropolitan Population by Decades, 1940-1980

	1940-1950	1950-1960	1960-1970	1970-1980
U.S. population, total	14.5%	18.5%	13.3%	11.4%
Inside Standard Metropolitan Areas	22.0	26.4	16.6	10.2
Central cities	14.0	10.7	6.4	0.1
Outside central cities	35.5	48.6	26.8	18.2
Outside Standard Metropolitan Areas	6.1	7.1	6.8	15.1

Note: Data reflects areas as defined at end of each decade.

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

Central City & Suburban Population, by Race, 1980/1970

	Number (000) 1980	% of U.S. Total 1980	% of U.S. Total 1970	% Change 1980/1970
All races, U.S. total	226,505	100.0%	100.0%	+ 11.4%
Metropolitan areas	169,405	74.8	75.6	+ 10.2
In central cities	67,930	30.0	33.4	+ 0.1
Suburban (outside central cities)	101,475	44.8	42.2	+ 18.2
Non-metropolitan areas	57,100	25.2	24.4	+ 15.1
White, total	188,341	100.0	100.0	+ 6.0
Metropolitan areas	138,044	73.3	75.1	+ 3.3
In central cities	47,014	25.0	29.9	- 11.5
Suburbs	91,029	48.3	45.3	+ 13.1
Non-metropolitan areas	50,297	26.7	24.9	+ 13.9
Black, total	26,488	100.0	100.0	+ 17.3
Metropolitan areas	21,474	81.1	79.1	+ 20.2
In central cities	15,301	57.8	60.0	+ 13.0
Suburbs	6,173	23.3	19.2	+ 42.7
Non-metropolitan areas	5,014	18.9	20.9	+ 6.5
Spanish origin, total	14,606	100.0	100.0	+ 61.0
Metropolitan areas	12,793	87.6	86.3	+ 63.5
In central cities	7,351	50.3	53.2	+ 52.4
Suburbs	5,443	37.3	33.1	+ 81.3
Non-metropolitan areas	1,813	12.4	13.7	+ 45.4

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

POPULATION TRENDS

Population by Regions & States

Of the over 26 million increase in resident population of the United States between 1970 and 1981, more than 14 million (54.3%) occurred in the South while another 9.3 million (35.8%) was in the western region. The rates of growth for the South and West were the highest, with percentage increases that were approximately twice the national average. In contrast, the Northeast and North Central regions recorded only about 10% of the nation's growth since 1970, causing the North's share of the population to decline from 52% to 47%.

The only state to register a decline in population between 1970 and 1981 was New York (-3.5%). The District of Columbia declined 16.6%. The largest increases in the U.S. during the period were registered by Nevada (+72.8) and Arizona (+57.4%).

Resident Population of States & Regions, 1970, 1981

	Number (000)		% Change
	July 1, 1981	April 1, 1970 (Census)	1981/1970
U.S. total	229,307	203,302	+ 12.8%
New England:	12,444	11,847	+ 5.0
Maine	1,333	994	+ 34.1
New Hampshire	936	738	+ 26.8
Vermont	516	445	+ 16.0
Massachusetts	5,733	5,689	+ 0.8
Rhode Island	953	950	+ 0.3
Connecticut	3,134	3,032	+ 3.4
Middle Atlantic:	36,876	37,213	- 0.9
New York	17,602	18,241	- 3.5
New Jersey	7,404	7,171	+ 3.2
Pennsylvania	11,871	11,801	+ 0.6
East North Central:	41,656	40,263	+ 3.5
Ohio	10,781	10,657	+ 1.2
Indiana	5,468	5,195	+ 5.3
Illinois	11,462	11,110	+ 3.2
Michigan	9,204	8,882	+ 3.6
Wisconsin	4,742	4,418	+ 7.3
West North Central	17,237	16,328	+ 5.6
Minnesota	4,094	3,806	+ 7.6
Iowa	2,899	2,825	+ 2.6
Missouri	4,941	4,678	+ 5.6
North Dakota	658	618	+ 6.5
South Dakota	686	666	+ 3.0
Nebraska	1,577	1,485	+ 6.2
Kansas	2,383	2,249	+ 6.0

(continued)

Population by Regions & States (continued)

Resident Population of States & Regions, 1970, 1981
(continued)

	Number (000)		% Change
	July 1, 1981	April 1, 1970 (Census)	1981/1970
South Atlantic:	37,751	30,679	+ 23.1%
Delaware	598	548	+ 9.1
Maryland	4,263	3,924	+ 8.6
District of Columbia	631	757	- 16.6
Virginia	5,430	4,651	+ 16.7
West Virginia	1,952	1,744	+ 11.9
North Carolina	5,953	5,084	+ 17.1
South Carolina	3,167	2,591	+ 22.2
Georgia	5,574	4,588	+ 21.5
Florida	10,183	6,791	+ 49.9
East South Central:	14,723	12,808	+ 15.0
Kentucky	3,662	3,221	+ 13.7
Tennessee	4,612	3,926	+ 17.5
Alabama	3,917	3,444	+ 13.7
Mississippi	2,531	2,217	+ 14.2
West South Central:	24,470	19,326	+ 26.6
Arkansas	2,296	1,923	+ 19.4
Louisiana	4,308	3,645	+ 18.2
Oklahoma	3,100	2,559	+ 21.1
Texas	14,766	11,199	+ 31.9
Mountain:	11,694	8,290	+ 41.1
Montana	793	694	+ 14.3
Idaho	959	713	+ 34.5
Wyoming	492	332	+ 48.2
Colorado	2,965	2,210	+ 34.2
New Mexico	1,328	1,017	+ 30.6
Arizona	2,794	1,775	+ 57.4
Utah	1,518	1,059	+ 43.3
Nevada	845	489	+ 72.8
Pacific:	32,456	26,548	+ 22.3
Washington	4,217	3,413	+ 23.6
Oregon	2,651	2,092	+ 26.7
California	24,196	19,971	+ 21.2
Alaska	412	303	+ 36.0
Hawaii	981	770	+ 27.4

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 913 (May 1982);
Series P-25, No. 876 (Feb. 1980).

Population by Regions & States (continued)

Of the 10 Standard Metropolitan Areas with the highest population growth rates from 1970 to 1980 five were in Florida, two in Nevada. Twenty-nine SMSA's declined in population during the 1970's. All but one were in the Northeast or North Central regions and included several of the nation's largest metropolitan concentrations--New York, Boston, Philadelphia, Buffalo, Pittsburgh, Cleveland, Detroit, Milwaukee and St. Louis. No SMSA in the South lost population during the 1970's.

The 10 Fastest Growing SMSA's, 1970 to 1980

Rank	SMSA	Percent Increase
1	Fort Myers-Cape Coral, Fla.	95.1
2	Ocala, Fla.	77.4
3	Las Vegas, Nev.	69.0
4	Sarasota, Fla	68.0
5	Fort Collins, Colo.	65.9
6	West Palm Beach-Boca Raton, Fla.	64.2
7	Fort Lauderdale-Hollywood, Fla.	63.5
8	Olympia, Wash.	61.6
9	Bryan-College Station, Tex.	61.4
10	Reno, Nev.	59.9

Source: U.S. Bureau of the Census, 1980 Census of Population, Supplementary Reports (PC80-S1-5).

Regional Projections

According to a report issued by the National Planning Association, Washington, D.C., in August 1982, Texas, California and Florida will lead the nation in both population and employment growth over the next 20 years. Of a projected 40 million increase in population between 1980 and 2000, 12.3 million (about 30%) will be in these states, with Texas in the lead, acquiring 5.5 million people by the year 2000.

A U.S. Bureau of Economic Analysis report issued in 1980, showed the Rocky Mountain region as the fastest growing area of the country between 1980 and the year 2000. This area is expected to grow by 31.8% during this period reaching a total population of 8.7 million people, up from the current figure of 6.6 million. A close second to the Rocky Mountain states in growth during this period, are those in the Southwest segment, which are estimated to grow by 25.4% to 26.7 million people.

The Mideast region is expected to register the lowest growth rate of any region between 1980 and 2000, rising a nominal 1.2% to 42.7 million people.

POPULATION TRENDS

Regional Projections (continued)

Projections of Population by Region, 1980 - 2000
(Totals in Millions)

	Total Population			% Change	% of Population		
	1980	1990	2000	2000/1980	1980	1990	2000
United States, total	226.5	243.1	258.7	+ 14.2%	100.0%	100.0%	100.0%
Rocky Mountain	6.6	7.7	8.7	+ 31.8	2.9	3.2	3.4
Southwest	21.3	23.7	26.7	+ 25.4	9.4	9.7	10.3
Southeast	52.6	57.2	62.6	+ 19.0	23.2	23.5	24.2
Far West	32.6	26.3	39.1	+ 19.9	14.4	14.9	15.1
Plains	17.2	18.4	19.4	+ 12.8	7.6	7.6	7.5
Great Lakes	41.7	44.1	45.8	+ 9.8	18.4	18.1	17.7
New England	12.3	13.1	13.7	+ 11.4	5.4	5.4	5.3
Mideast	42.2	42.6	42.7	+ 1.2	18.6	17.5	16.5

Source: U.S. Department of Commerce,
Bureau of Economic Analysis,
Survey of Current Business,
November 1980.

The Conference Board has compiled a broad outline of the demographic and economic developments anticipated in the next decade in the nation's nine major regions, as summarized in the table below. The Sunbelt States and the West are expected to show the greatest growth in population and in total income, with meager growth in the population of the Middle Atlantic States.

Projections of Population & Personal Income by Place

	Population		Personal Income		Per Capita Income	
	Distribution per 1,000 persons 1990	% Change 1980/1990	Distribution per $1,000 1990	% Change 1980/1990	U.S. Average = 100 1980	1990
United States, total	1,000.0	9.4%	$1,000.0	46.5%	100	100
New England	54.0	6.2	52.9	39.3	101	99
Middle Atlantic	151.8	0.5	153.5	32.2	104	104
East North Central	181.4	6.3	188.3	41.6	105	105
West North Central	75.7	6.9	73.7	43.2	97	98
South Atlantic	165.2	13.0	158.0	53.9	94	95
East South Central	65.2	11.2	56.4	57.8	81	87
West South Central	107.6	14.5	105.6	57.7	94	95
Mountain	54.1	19.9	53.3	65.8	95	96
Pacific	145.0	14.1	158.3	48.7	112	108

Source: U.S. Department of Commerce; The Conference Board (Across the Board, May 1981).

POPULATION TRENDS

Mobility

Of the 202.2 million persons 4 years old and over in the population in 1980, 91.2 million (45.1%) had changed addresses during the period March 1975 to March 1980. The Western region ranked highest in the percent of population who had moved during the period, (53.9%) while the Northeast had the lowest ratio (36.1%). About 43% of the people who moved went to a different county; while 20% moved to a new state; 1.9% came from abroad.

The highest mobility rates are usually found for persons in their twenties when many are establishing their own households, starting new jobs, finishing school or service in the Armed Forces, or getting married. In their latter twenties, many are buying a house or moving to housing more convenient to schools. In the 5-year period, 77% of the persons 25 to 29 years old in 1980 and 65% of those 20 to 24 had changed residence, compared with only 45% of the total population. Young children have high mobility rates reflecting the high mobility of their young parents.

Mobility Status of the Population 4 Years Old & Over
Between March 1975 & March 1980

		Region of Residence in 1980			
	U.S. Total	Northeast	North Central	South	West
Persons 4 years old & over (in thousands)	202,216	45,249	53,544	65,742	37,501
Residence in 1980 compared with 1975					
Total (percent)	100.0%	100.0%	100.0%	100.0%	100.0%
Living in:					
Same house	53.0	62.1	55.2	51.0	42.5
Different house in U.S. (movers)	45.1	36.1	43.7	47.4	53.9
Same county	25.8	23.3	26.4	24.9	29.3
Different county	19.3	12.8	17.3	22.4	24.6
Same state	10.2	7.7	10.6	10.8	11.5
Different state	9.1	5.1	6.7	11.6	13.1
Northeast	1.9	2.7	0.8	2.2	1.9
North Central	2.4	0.6	3.0	2.6	3.2
South	2.9	1.3	1.8	5.2	2.4
West	2.0	0.5	1.2	1.6	5.5
Movers from abroad	1.9	1.8	1.0	1.6	3.6

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20 No. 368 (December 1981).

Data on a household basis indicate a trend to less mobility in recent years. A newly released report in the annual housing survey conducted by the Census Bureau for the U.S. Department of Housing and Urban Development showed that 18% of all households changed residences between October 1979 and 1980, down from 19% in 1979 and 20% in 1978. Recent movers comprised 23% of all households in the West

Mobility (continued)

in 1980 compared with 19% in the South, 16% in the North Central states, 13% in the Northeast.

Recent-mover homeowners reported higher family incomes (a median of $21,900) compared with all homeowners ($19,800), and their new properties were valued at a median of $60,400 compared with $51,300 for all homeowners.

The current unemployment rate may have caused a rise in population mobility, as past experience has shown that mobility status varies by labor force status. Data for 1980 showed a 56% mobility rate among civilians who were not employed vs. 49% for the employed. Persons not in the labor force have much lower mobility rates than either of these groups (35%).

Mobility status also varies among occupation groups. Farm workers have the lowest rate; professional workers have a higher rate than that of other nonfarm workers. Between 1975 and 1980, blacks and whites changed residence at about the same rate (45% and 46%, respectively). However, blacks tend to move shorter distances than whites, tending to stay in the same county to a greater extent.

MARRIAGES & MARITAL STATUS

For the sixth consecutive year, marriages registered an increase in 1981, reaching a total of 2,438,000. This was 25,000 more than the previous record high reported for 1980. In the first 10 months of 1982 the number of marriages showed an increase of 3.0% compared with the same 1981 period. The marriage rate rose from 10.8 in the 1981 period to 11.0 per 1,000 population.

The rate for the year 1981 was 10.6 per 1,000 population. This was also the rate in 1980, which had ended a decade in which the marriage rate slowly moved downward from a peak in 1972 and gradually reversed direction and started to climb in 1978.

Marriages & Marriage Rates in the U.S.
(Selected Years, 1960 - 1981)

Year	Number	Rate per 1,000 of Total Population
1981(p)	2,438,000	10.6
1980(p)	2,413,000	10.6
1979	2,359,000	10.7
1977	2,178,367	10.1
1976	2,154,807	10.0
1975	2,152,662	10.1
1970	2,158,802	10.6
1965	1,800,000	9.3
1960	1,523,000	8.5

(p) provisional

Source: U.S. Department of Health & Human Services,
National Center for Health Statistics,
Monthly Vital Statistics Report.

MARRIAGES & MARITAL STATUS

The proportion of the adult population that has never married has increased greatly in the past 12 years. The percentage of women 25 to 29 years old who had never married doubled from 11% in 1970 to 23% in 1982, while the percentage of never-married men in the same age group was up from 19% to 36%.

Although most young men and women are expected to marry eventually, they are delaying marriage compared with their counterparts 12 years ago. It is not yet possible to determine the duration or permanence of the postponement. Better job opportunities for women are certainly a factor in the postponement. Current economic conditions and scarcity of affordable housing may also be factors.

Distribution of Single (Never Married) Population by Age Group
(Noninstitutionalized Population)

	Females			Males		
	1982	1980	1970*	1982	1980	1970*
Total 15 years & older	22.5%	22.5%	22.1%	29.7%	29.6%	28.1%
15 to 19 years	92.0	91.2	90.3	97.5	97.3	97.4
20 to 24 years	53.4	50.2	35.8	72.0	68.8	54.1
25 to 29 years	23.4	20.9	10.5	36.1	33.1	19.1
30 to 34 years	11.6	9.5	6.2	17.3	15.9	9.4
35 to 39 years	6.4	6.2	5.4	10.0	7.8	7.2
40 to 44 years	4.7	4.8	4.9	7.4	7.1	6.3
45 to 54 years	4.1	4.7	4.9	5.4	6.1	7.5
55 to 64 years	4.2	4.5	6.8	4.6	5.3	7.8
65 years & over	5.6	5.9	7.7	4.4	4.9	7.5

* Figures for 1970 include persons age 14.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 376 (October 1982)

Divorce

The rise in the number of divorced persons in the population has been a major marital status phenomenom in American society. The increased rate of divorce is measured by the divorce ratio, i.e, the number of divorced persons per 1,000 who are married and living with their spouse. As of March 1981 the ratio stood at 109, which was more than double the ratio of 47 in 1970. Women had a higher ratio than men (129 vs. 88) in 1981, reflecting the fact that men are more likely to remarry, and do so more quickly, after divorce than women. The divorce ratio for blacks (233) was higher than for whites or for Hispanics. The ratio for black women was particularly high at 289.

Perhaps a reflection of economic conditions, the number of divorces in 1982 fell below the 1981 level. In the January-October 1982 period there were 980,000

Divorce (continued)

divorces, a 3.5% decline compared with the number in the same period of 1981. The divorce rate in this period declined from 5.3 per 1,000 population in 1981 to 5.1 in 1982, according to the National Center for Health Statistics.

HOUSEHOLDS & FAMILIES

According to the Current Population Survey conducted by the U.S. Bureau of the Census, there were 83.5 million households in the United States in March 1982 compared with 80.8 million in 1980 and 63.4 million in 1970. Of the total, 61 million were family households (that is, containing a group of two or more related persons), registering a gain of almost 32% in 1982 compared with 1970. Families headed by a female householder (no husband present) showed a sharper rise--71%.

Data for 1982 showed a continued increase in the household population living in other than married-couple households--representing 12% of the total in 1982 compared with 7% in 1970. Another 15% of the household population lived in family households maintained by a man or woman with no spouse present, compared with 11% in 1970.

Most of the nonfamily households (86%) consist of individuals living alone. These represented 23% of all households in 1982, up from 17% in 1970. However, people living alone accounted for only about 9% of the total number of people counted in households of all types compared with 6% in 1970.

The dramatic increase in nonfamily households (up 71% in 1982 compared with 1970) and particularly of single-person households (up 78%) is reflected in the reduction in the average household size. This has declined from 3.67 persons in 1940, 3.06 in 1972, down to 2.72 in 1982.

The average population per family reached 3.25 in 1982, compared with 3.53 in 1972, 3.76 in 1940. Major factors which have contributed to the radical change in household/family size include the rise in the incidence of separation and divorce, postponement of marriage by young adults, and an increase in the number of elderly persons who maintain their own homes.

Households & Families by Size & Type
(Numbers in Thousands)

	1982		1980		1970		% Change
	Number	%	Number	%	Number	%	1982/1970
Households, total	83,527	100.0%	80,776	100.0%	63,401	100.0%	+ 31.7%
Family households	61,019	73.1	59,550	73.7	51,456	81.2	+ 18.6
Married-couple family	49,630	59.4	49,112	60.8	44,728	70.5	+ 11.0
Male householder, no wife present	1,986	2.4	1,733	2.1	1,228	1.9	+ 61.7
Female householder, no husband present	9,403	11.3	8,705	10.8	5,500	8.7	+ 71.0

(continued)

Households & Families by Size & Type
(Numbers in Thousands)
(continued)

	1982		1980		1970		% Change
	Number	%	Number	%	Number	%	1982/1970
Nonfamily households	22,508	26.9%	21,226	26.3%	11,945	18.8%	+ 88.4%
Male householder	9,457	11.3	8,807	10.9	4,063	6.4	+132.8
Female householder	13,051	15.6	12,419	15.4	7,882	12.4	+ 65.6
Living alone	19,354	23.2	18,296	22.7	10,851	17.1	+ 78.4
Families total	61,019	100.0	59,550	100.0	51,586	100.0	+ 18.3
Married couple	49,630	81.3	49,112	82.4	44,755	86.8	+ 10.9
Male head, no wife present	1,986	3.3	1,733	2.9	1,239	49.5	+ 60.3
Female head, no husband present	9,403	15.4	8,705	14.6	5,591	2.4	+ 68.2
Average Size (number)							
All households	2.72		2.76		3.14		
Families	3.25		3.29		3.58		

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 376 (October 1982).

Of the 49.3 million married-couple families in the population in 1981, about 82% had own children under 18 years of age. In 1970, 87% of the 44.7 million married-couple families had own children under 18. A striking development has been the increase in households headed by women who have their own children under 18. These represented 15.1% of family households in 1981--up from 10.7% of the 1970 total.

In the 1980's the number of households is expected to increase to about 97 million. Average family size will decline, with one- and two-child families more prevalent. Currently, average household size is 2.8. It is expected to decline to 2.5 persons by the end of the decade. The elderly population (65 and over) will account for both an increasing share of the population and of new households in coming years.

Regional Distribution

The fastest growth in the number of households has been in the West, which registered a 17.3% increase between 1975 and 1982. However, about one-third of the U.S. households are in the South--the biggest concentration, with the North Central region ranking second.

HOUSEHOLDS & FAMILIES

Regional Distribution (continued)

Number of Households by Geographic Region in the U.S., 1975, 1981
(Number in Thousands)

	Total		% Distribution		% Change
	1981	1975	1981	1975	1981/1975
Households, U.S. total	82,368	72,867	100.0%	100.0%	+ 13.0%
Northeast	17,781	16,427	21.6	22.5	+ 8.2
North Central	21,200	19,256	25.7	26.4	+ 10.1
South	27,220	23,407	33.0	32.1	+ 16.3
West	16,167	13,777	19.6	18.9	+ 17.3

Source: U.S. Bureau of the Census, Current Population Reports, (P-20; Nos. 311, 371).

LIVING ARRANGEMENTS

Two noteworthy trends which have developed in the U.S. in recent years are the increase in the number of people living alone and in the number of unmarried-couple households.

In 1982 single-person households numbers 19,354,000, representing 23.2% of all U.S. households. This was a gain of 78% over the 1970 total of 10,851,000 single-person households, which represented 17.1% of the total that year. The postponement of marriage, the increasing divorce rate and the declining death rate are all factors in this development.

The fastest-growing segment of the single populace is male, although women accounted for about 62% of those living alone in 1981. Among women living alone, 17.9% were under 35 years of age in 1981 compared with about 42% of the men living alone who were under 35. The elderly who live alone are primarily women. Among women living alone, almost 52% were 65 years of age or older compared with 20% of the men in 1981.

Persons Living Alone, by Marital Status, Age & Sex: 1970, 1981
(Numbers in Thousands)

	1981				1970				% Change 1981/1970	
	Male		Female		Male		Female			
	No.	%	No.	%	No.	%	No.	%	Male	Female
Total living alone	7,253	100.0%	11,683	100.0%	3,532	100.0%	7,319	100.0%	105.4	59.6
Marital status:										
Married, spouse absent	950	13.1	654	5.6	486	13.8	473	6.5	95.5	38.3
Widowed	1,124	15.5	6,566	56.2	940	26.6	4,716	64.4	19.6	39.2
Divorced	1,908	26.3	1,799	15.4	688	19.5	798	10.8	177.3	125.4
Single	3,271	45.1	2,664	22.8	1,418	40.1	1,340	18.3	130.7	98.8

(continued)

Persons Living Alone, by Marital Status, Age & Sex: 1970, 1981
(Numbers in Thousands)
(continued)

	1981				1970				% Change 1981/1970	
	Male		Female		Male		Female			
	No.	%	No.	%	No.	%	No.	%	Male	Female
Age:										
Under 25 yrs.	899	12.4%	748	6.4%	275	7.8%	282	3.9%	226.9%	165.2%
25 to 34 yrs.	2,140	29.5	1,344	11.5	533	15.1	358	4.9	301.5	275.4
35 to 44 yrs.	1,044	14.4	608	5.2	399	11.3	313	4.3	161.7	94.2
45 to 64 yrs.	1,712	23.6	2,955	25.3	1,151	32.6	2,470	33.7	48.7	19.6
65 yrs. & over	1,458	20.1	6,028	51.6	1,173	33.8	3,897	53.2	24.3	54.7

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 372

The number of unmarried couples living together has more than tripled in the last 10 years, reaching a total of 1,863,000 in 1982. This represented somewhat less than 4% of all couples (married and unmarried) in the U.S., double the number five years ago. In about 81% of the unmarried-couple households, one or both partners were under age 35. Most of the persons in this type of household were in the same age group as their partners.

About 72% of such households contain no children. Some half million have at least one child, according to the March 1981 Current Population Survey. Counting both children and adults, more than four million Americans now live in a household that includes two unmarried adults of the opposite sex.

The trend toward cohabitation appears to represent a new wave of household relationships that may become entrenched as a way of life if growth continues through this decade at the same pace as in the past decade. However, there is expectation that in the last half of the 1980's and through the 1990's families should increase in number a little faster than unrelated individuals for the first time in decades, with the share of consumer units headed by families stabilizing at about 67%.

Another striking development in living arrangements has been the great increase in the number of children living with only one parent, reaching 12.6 million in 1981 for a gain of 54% compared with 1970. While the number of children under 18 years old has declined, the proportion affected by separation and divorce has increased. Over 20% of all children lived in one parent situations in 1981 compared with less than 12% in 1970, in most cases with their mothers.

LIVING ARRANGEMENTS

Living Arrangements of Persons Under 18 Years Old: 1981 & 1970

(Excludes persons under 18 years old who were maintaining families or subfamiles)
(Numbers in Thousands)

	All Races			Black	
	1981	1970	% Change 1981/1970	1981	% of all races
Living arrangements					
Children under 18	62,918	69,162	- 9.0%	9,400	14.9%
Living with --					
Two parents	48,040	58,939	- 18.5	4,016	8.4
One parent	12,619	8,199	+ 53.9	4,310	34.2
Mother only	11,416	7,451	+ 53.2	4,074	35.7
Divorced	4,912	2,296	+113.9	982	20.0
Married	3,540	3,234	+ 9.5	1,492	42.1
Separated	3,112	2,332	+ 33.4	1,385	44.5
Widowed	1,158	1,395	- 17.0	355	30.7
Single (never married)	1,807	527	+242.9	1,245	68.9
Father only	1,203	748	+ 60.8	236	19.6
Divorced	614	177	+246.9	66	10.7
Married	296	287	+ 3.1	79	26.7
Separated	261	152	+ 71.7	65	24.9
Widowed	181	254	- 28.7	40	22.1
Single (never married)	112	30	+273.3	50	44.6
Other relatives only	1,911	1,547	+ 23.5	1,013	53.0
Nonrelatives only	348	477	- 27.0	61	17.5

Source: U.S. Bureau of the Census, *Current Population Reports*, Series P-20, No. 374.

SCHOOL ENROLLMENT

During the next decade pre-primary and elementary school enrollment will surge, and secondary enrollment will continue to decline.

SCHOOL ENROLLMENT

Projected Enrollment in Educational Institutions, 1981-1990

Year	Total*	Pre-primary	Grades 1 to 8	Grades 9 to 12
1981(r)	59,747	5,205	27,867	14,233
1982	59,388	5,372	27,613	13,783
1983	59,022	5,584	27,383	13,542
1984	58,877	5,859	27,133	13,534
1985	58,931	6,127	27,015	13,615
1986	59,365	6,379	27,369	13,497
1987	59,883	6,585	27,988	13,217
1988	60,275	6,683	28,658	12,836
1989	60,907	6,772	29,438	12,558
1990	61,699	6,877	30,298	12,423

(r) revised
*Total also includes higher education students.

Source: National Center for Education Statistics,
The Condition of Education (1982 Edition).

The current level of enrollment in school, reported at 59.4 million, is one million less than the total for the year 1970. The total is not expected to hit the 60.0 million market for another five years.

Enrollment in pre-primary grades, however, is expected to grow as it has in recent years. Between 1970 and 1981, the nursery school enrollment increased rapidly due to growing recognition of the value of pre-primary education, as well as the growth of employment of women with young children. The rise in the number of births, of course, also will bring an increase in enrollment in the lower grades in the next few years.

In 1970, the number of men enrolled in college was larger than the number of women in every age group. By 1981, however, the number of women enrolled increased by 128%, while male enrollment grew by 22%. As a result, female students outnumbered their male counterparts in every age group except in the 20-to-29 year old span.

College enrollment of single women 18 to 24 years old more than tripled from 1960 to 1980. Another development was the sharp increase in enrollment for part-time attendance by older women. In general, in the 1980's fewer college students will come from the 18-to-24 year age group, more from the 25-to-64 group.

SCHOOL ENROLLMENT

College Enrollment by Full-Time Status
(Numbers in Thousands)

College-Enrolled By Sex & Age	1981		1980		1970	
	Total	% Full-time	Total	% Full-time	Total	% Full-time
Male, total 14 & over	5,825	68.6%	5,430	69.4%	na	na
Under 20 years	1,546	90.7	1,465	91.6	1,476	95.5%
20 to 24 years	2,383	80.8	2,235	81.9	1,985	83.8
25 & over*	1,895	35.2	1,730	34.6	940*	42.9*
Female, total 14 & over	6,303	60.9	5,957	60.1	na	na
Under 20 years	1,730	91.4	1,718	90.6	1,378	92.6
20 to 24	2,147	74.5	2,060	73.4	1,226	73.5
25 & over*	2,425	27.0	2,180	23.5	409	26.6

na = not available
* Covers age 25 to 34 years only.

Source: U.S. Bureau of the Census, Current Population Reports (Series P20, No. 374).

EDUCATIONAL ATTAINMENT

The current population of young adults has completed substantially more years of school than members of the older generation. Survey results show that about 86% of persons 25 to 34 years of age in 1981 were high school graduates, but among persons 55 to 64 only 63% had completed high school. The difference was much greater among blacks: 76% of the young adults had completed high school, only 32.5% of the older group.

The proportion of persons 25 years old and over who completed at least one year of college was greater for men than women in both 1970 and 1981. In 1970, about 25% of men as compared with 18% of women had attained this level while in 1981 37% of men and 28% of women had completed one year of college.

In 1970, blacks 25 to 34 years old were much less likely than their white counterparts to have completed at least one year of college; 15% for blacks, compared with 31% for whites. By 1981, the proportionate difference had declined as the figures had increased to 34% for blacks and 46% for whites. In the same age group in 1981 the proportion of blacks who had completed one to three years of college was about the same as whites in 1981 (about 22%), but the proportion who had completed four or more years of college was 12% for blacks compared with 24% for whites.

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1980 & 1970

(Numbers in Millions)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
ALL RACES	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
Both sexes, 25 years & over	132.9	69.7%	32.1%	17.1%	109.3	55.2%	21.2%	11.0%
25 to 34 years	37.8	85.6	44.9	23.2	24.9	73.8	29.8	15.8
35 to 44 years	26.2	79.0	37.6	21.5	23.0	64.3	23.8	12.8
45 to 54 years	22.5	69.6	28.8	15.8	23.3	58.2	20.1	10.0
55 to 64 years	21.7	62.6	23.8	12.0	18.4	43.8	17.2	8.7
65 years & over	24.7	41.8	17.3	8.5	19.7	28.3	12.6	6.3
Male, 25 years & over	62.5	70.3	36.7	21.1	51.8	55.0	24.9	14.1
25 to 34 years	18.6	86.1	48.6	26.1	12.2	74.3	34.8	19.7
35 to 44 years	12.8	79.1	42.5	26.2	11.2	63.7	29.0	17.2
45 to 54 years	10.8	68.3	33.8	20.6	11.2	57.0	23.9	13.0
55 to 64 years	10.1	61.8	28.3	16.3	8.7	42.0	18.1	9.9
65 years & over	10.1	40.8	19.1	11.0	8.4	25.9	13.4	7.9
Female, 25 years & over	70.4	69.1	28.1	13.4	57.5	55.4	18.0	8.2
25 to 34 years	19.2	85.2	41.3	20.4	12.6	73.3	25.0	12.0
35 to 44 years	13.4	78.9	32.8	17.0	11.8	64.9	18.9	8.7
45 to 54 years	11.7	70.8	24.1	11.3	12.1	59.4	16.6	7.3
55 to 64 years	11.6	63.2	19.8	8.3	9.7	45.4	16.3	7.6
65 years & over	14.6	42.5	16.1	6.8	11.3	30.1	11.9	5.2
WHITE								
Both sexes, 25 years & over	116.6	71.6	33.1	17.8	98.1	57.4	22.3	11.6
25 to 34 years	32.5	86.9	45.9	24.3	21.9	76.1	31.2	16.6
35 to 44 years	22.7	80.7	38.9	22.5	20.4	66.9	25.0	13.6
45 to 54 years	19.7	72.6	30.0	16.6	21.0	61.2	21.2	10.6
55 to 64 years	19.5	65.8	25.1	12.8	16.7	46.5	18.2	9.1
65 years & over	22.3	44.2	18.4	9.0	18.1	29.9	13.3	6.7
Male, 25 years & over	55.2	72.1	38.0	22.2	46.6	57.2	26.2	15.0
Female, 25 years & over	61.4	71.2	28.0	13.8	51.5	57.6	18.6	8.6
BLACK								
Both sexes, 25 years & over	13.3	52.9	21.2	8.2	10.1	33.7	10.3	4.5
25 to 34 years	4.3	75.9	34.1	11.7	2.7	53.4	15.0	6.1
35 to 44 years	2.8	64.1	23.1	9.1	2.3	41.6	12.2	5.2
45 to 54 years	2.3	44.9	17.2	7.9	2.1	29.1	9.3	3.8
55 to 64 years	1.9	32.5	10.3	4.3	1.5	17.0	6.3	3.8
65 years & over	2.1	17.6	6.5	3.5	1.4	9.0	4.4	2.0
Male, 25 years & over	5.8	53.2	22.1	8.2	4.6	32.4	10.2	4.6
Female, 25 years & over	7.4	52.6	20.5	8.2	5.5	34.8	10.4	4.4

(continued)

EDUCATIONAL ATTAINMENT

Years of School Completed by the Population 25 Years Old & Over, By Age, Sex, Race, & Spanish Origin: March 1980 & 1970

(Numbers in Millions)
(continued)

Age, sex, race, Spanish origin, & region	1981				1970			
		Percent				Percent		
SPANISH ORIGIN*	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More	All Persons	4 Years of High School or More	1 Year of College or More	4 Years of College or More
Both sexes, 25 years & over	6.3	44.5%	18.2%	7.7%	3.9	32.1%	11.0%	4.5%
25 to 34 years	2.4	56.9	24.4	8.8	1.3	44.5	14.6	5.4
35 to 44 years	1.5	48.0	18.2	8.2	1.1	33.6	11.7	5.1
45 to 54 years	1.0	38.7	17.6	9.0	1.2	23.8	8.3	3.8
55 to 64 years	0.8	27.3	9.8	5.1				
65 years & over	0.6	17.0	4.8	2.8	0.4	13.4	5.4	2.5
Male, 25 years & over	3.0	45.5	21.0	9.7	1.9	33.4	13.5	5.9
Female, 25 years & over	3.3	43.6	15.8	5.9	2.1	31.0	8.7	3.2

na = not available
*Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374.

LABOR FORCE, EMPLOYMENT & EARNINGS

Changes in the age composition of the population are reflected in the growing rate of participation in the labor force. In the year 1981 an average 64.3% of the U.S. noninstitutional population 16 years and over was in the total labor force (including the Armed Services). This compares with 61% in 1971, 60.2% in 1961. By the end of 1982 over 113 million people were in the total labor force; over 111 million of these were counted in the civilian labor force. Both of these were record highs, comparing with the previous peak of 110.8 million in the total labor force in 1981, 108.7 million in the civilian labor force.

Labor Force Profile, 1979-1981, November 1981 & November 1982

(Thousands of persons 16 years of age & over)

	November*		Annual Average		
	1982	1981	1981	1980	1979
Total noninstitutional population, 16 years & older	175,238	173,155	172,272	169,848	166,951
Total labor force**	113,199	111,430	110,812	109,042	107,050
% of population	64.6%	64.4%	64.3%	64.2%	64.1%

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Labor Force Profile, 1979-1981, November 1981 & November 1982
(Thousands of persons 16 years of age & over)
(continued)

	November*		Annual Average		
	1982	1981	1981	1980	1979
Civilian labor force	111,019	109,272	108,670	106,940	104,967
Employed, total	99,086	100,172	100,397	99,303	98,824
Agricultural	3,470	3,372	3,368	3,364	3,347
Nonagricultural	95,616	96,800	97,030	95,938	95,477
Unemployed, total	11,987	9,100	8,273	7,367	6,137
% of civilian labor force	10.8%	8.3%	7.6%	7.1%	5.8%

* Seasonally adjusted
**Includes Armed Forces

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (December 1982)

The total number of people with civilian jobs as of December 1982 stood at just over 99 million, about 600,000 below the 1981 year-end figure. For the entire year 1982 civilian employment averaged about 99.5 million. This compares with 100.4 million for the year 1981 (which was a record high).

Projections on total employment compiled by the Bureau of Labor Statistics anticipate an employment level of between 119.6 million and 127.9 million workers by the year 1990.

Employment of the Civilian Labor Force, Annual Averages 1977-1981, November, 1982
(In Thousands)

Year	Civilian Labor Force	Employment		
		Total	Male	Female
1977	99,009	92,017	54,728	37,289
1978	102,251	96,048	56,479	39,569
1979	104,962	98,824	57,607	41,217
1980	106,940	99,303	57,186	42,117
1981	108,670	100,397	57,397	43,000
November 1982*	111,019	99,032	55,863	43,169

* Seasonally adjusted

Source: U.S. Bureau of Labor Statistics.

The influx of women into the work force, which got underway in the 1970's, has continued. Women accounted for three-fifths of the increase in the civilian labor force in the last decade--more than 13 million women compared with nearly 9 million men.

LABOR FORCE, EMPLOYMENT & EARNINGS

In 1981, 46.7 million women were in the civilian labor force. This represented 52% of the total female noninstitutional population 16 years of age and older, and accounted for 43% of the total civilian labor force. In 1972, 33.5 million women were in the civilian labor force, representing 38.5% of that total, and about 44% of the total population.

Labor force participation rates for women are almost equal on the basis of race/ethnic origin: 53% for black women in 1981 (5.4 million women), 52% for white women (40.2 million) and 48% for Spanish-origin women (2.2 million).

More than one-fourth (28%) of all women workers held part-time jobs in 1981. Most (78%) were employed part-time on a voluntary basis. About 66% of all part-time workers were women.

The majority of women work because of economic need. Two-thirds (66%) of all women in the labor force in March 1982 were single or had husbands whose earnings in 1981 were less than $15,000 (21%). However, the more education a woman has the greater the likelihood that she will seek paid employment. Among women with four or more years of college 58% were in the labor force in 1981. In March 1981 the median years of schooling was the same for both the average women and the average man worker--12.7 years.

Latest available monthly data (not seasonally adjusted) on employment of men and women by age is noted below.

Employment Status of the Noninstitutional Population
By Sex & by Age, November, 1982
(Numbers in Thousands)

	In Total Labor Force*		In Civilian Employment	Unemployed		Not in Labor Force	
	Number	% of Population In Each Age Group		Number	% of Civilian Labor Force	Number	In School** Number
Men							
16 yrs. & older	64,373	76.3%	56,203	6,172	9.9%	19,424	4,921
16-19	4,415	54.9	3,147	1,035	24.7	3,633	3,277
20-24	9,283	85.2	7,123	1,380	16.2	1,619	1,174
25-54	41,626	94.2	37,346	3,298	8.1	2,558	462
55-64	7,023	70.4	6,827	374	5.2	3,028	8
65 & over	1,846	17.7	1,760	85	4.6	8,586	--
Women							
16 yrs. & older	48,582	53.2	43,622	4,771	9.9	42,639	4,792
16-19	3,947	50.4	3,036	889	22.6	3,886	3,160
20-24	7,558	70.0	6,439	1,027	13.8	3,234	1,017
25-54	30,923	67.5	28,270	2,577	8.4	14,884	589
55-64	4,924	42.0	4,689	234	4.8	6,794	20
65 & over	1,231	8.1	1,187	43	3.5	13,890	5

*Includes civilian and military members of the labor force.
**Covers only those people who are in school who are not in the labor force. Many people in the labor force are, of course, also enrolled in school.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings, (November, 1982).

LABOR FORCE, EMPLOYMENT & EARNINGS

The number of working mothers has increased more than tenfold since 1940, while the the number of working women more than tripled. Of all mothers with children under 18 years of age (18.7 million), 59% were in the labor force in March 1982; 50% of mothers with preschool children (7.4 million mothers) were working.

Putting it another way, about 55% of all children under age 18 (32 million) had working mothers as of March 1982; 46% of all children under 6 (8.5 million) had mothers in the labor force.

Unemployment

With the deepening recession in 1982, unemployment grew rapidly. According to preliminary figures issued by the Bureau of Labor Statistics, 10.8% of the civilian labor force, or over 12 million people, were looking for work as of December 1982. This compares with an unemployment rate of 8.8% at the end of 1981.

For the year 1982, unemployment averaged 9.7%, the highest rate since the 9.9% average registered in 1941. Economists anticipate further increases to 11% or higher in the jobless rate in the early months of 1983, an annual rate for the year that may be over 10%, and a rate of about 8.5% to 9.0% by the end of 1984.

Unemployment has continued to rise in the first quarter of every economic recovery since World War II. As economic conditions improve it is expected that many discouraged workers not currently counted in the labor force, since they are not actively looking for work, will resume looking. The economy, on the other hand, will not be able to accommodate all of the additional people seeking jobs. In the last quarter of 1982, over 1.8 million people were in the discouraged worker category--up from over 1.6 million in the previous quarter and the highest number since the Department of Labor began keeping these records in 1967. The average period a worker was jobless edged up to 18 weeks, the longest since the 1940's.

An encouraging sign, on the other hand, was that factory job losses slowed in December 1982 and factory hours held steady.

Unemployment (continued)

Unemployment, Annual Averages 1977-1981 & November 1982

	Total Unemployed		Males (16 & Older)		Females (16 & Older)	
Year	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force	Number (Thous.)	% of Civilian Labor Force
1977	6.991	7.1	3,667	6.3	3,324	8.2
1978	6,202	6.1	3,142	5.3	3,061	7.2
1979	6,137	5.8	3,120	5.1	3,018	6.8
1980	7,637	7.1	4,267	6.9	3,370	7.4
1981	8,273	7.6	4,577	7.4	3,696	7.9
Nov. 1982*	11,906	10.7	6,660	10.7	4,816	9.9

* Seasonally adjusted annual rate. Preliminary figures for 1982 showed the unemployment total at over 12 million, the rate for the month at 10.8%.

Source: U.S. Bureau of Labor Statistics.

There is considerable variation in the seriousness of the problem of unemployment within the population. Unemployment is highest among blacks, particularly among young black women, 16 to 19 (42.2% in 1981); the least among white adult males, age 20 and over (5.6% in 1981). In December 1982 the rate for teenagers was 24.5%; the unemployment rate for blacks was 20.8%; for blue-collar workers, 16.3%; adult men, 10.1%, adult women, 9.2%.

Unemployment Rates by Sex, Age & Race, 1980, 1981, Seasonally Adjusted Quarterly Averages, 1982
(% of Labor Force Unemployed)

	1982			Annual Average		
	3rd Qtr.	2nd Qtr.	1st Qtr.	1981	1980	1979
All civilian workers	9.9%	9.5%	8.8%	7.6%	7.1%	6.0%
Men, 20 years & over	9.1	8.4	7.7	6.3	5.9	4.2
Women, 20 years & over	8.3	8.2	7.6	6.8	6.3	6.0
Both sexes, 16-19	23.9	22.8	21.9	19.6	17.1	16.3
Race:						
White	8.8	8.4	7.7	6.7	6.3	5.2
Black & other	17.7	17.1	15.9	15.5	14.1	12.6
Hispanic origin	14.2	13.2	13.0	10.5	10.1	9.1

Source: U.S. Bureau of Labor Statistics

Unemployment (continued)

Unemployment Rates by Occupation & Sex, 1980, 1981, November 1981, 1982

	Men				Women			
	November*		Annual Average		November		Annual Average	
	1982	1981	1981	1980	1982	1981	1981	1980
Total labor force, age 16 & over	10.7%	7.8%	7.4%	6.9%	9.9%	8.3%	7.9%	7.4%
White-collar workers	4.1	2.8	2.8	2.7	6.3	5.6	5.0	4.6
Professional, technical	3.2	2.2	2.2	2.0	3.9	3.4	3.4	3.0
Mgrs., admins., exc. farm	3.2	2.5	2.1	2.0	4.7	4.2	4.1	3.5
Sales workers	5.2	3.5	3.4	3.5	7.1	6.3	5.9	5.4
Clerical workers	7.4	4.4	5.1	4.8	7.6	6.7	5.9	5.4
Blue-collar workers	15.1	10.6	9.8	9.4	16.8	12.0	12.7	12.6
Service workers	11.6	9.5	9.2	8.1	10.5	9.5	8.6	8.6
Farm workers	7.7	6.5	4.5	3.7	10.3	7.9	8.1	8.1

*Not seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment by Industry & Occupation

Service-producing jobs, rather than goods-producing, have been showing the fastest rate of growth in recent years. In 1981, service-producing occupations accounted for 72% of all employees on nonagricultural payrolls compared with 70.5% in 1979. As of November 1982 their share had risen to 74%. (Not included in the following table are proprietors, self-employed persons, domestic servants and agricultural workers. These are, however, included in total civilian employment data.)

Employees on Nonagricultural Payrolls by Industry Division, 1979-1981, November 1982, 1981 (In Thousands)

	November (p)		%	Annual Averages		
	1982	1981	Change	1981	1980	1979
Total	88,715	90,996	- 2.5%	91,105	90,406	89,823
Goods-producing, total	23,086	25,176	- 8.3	25,481	25,658	26,461
Mining	1,051	1,202	-12.6	1,132	1,027	958
Construction	3,850	4,071	- 5.4	4,167	4,346	4,463
Manufacturing	18,185	19,903	- 8.6	20,173	20,285	21,040
Service-producing	65,629	65,820	- 0.3	65,625	64,748	63,363
Transportation & public utilities	5,009	5,150	- 2.7	5,157	5,146	5,136
Wholesale trade	5,232	5,375	- 2.7	5,359	5,275	5,204
Retail trade	15,156	15,248	- 0.6	15,192	15,035	14,989
Finance, insurance, real estate	5,364	5,324	- 0.7	5,301	5,160	4,975
Services	19,127	18,815	+ 1.7	18,592	17,890	17,112
Government	15,741	15,908	- 1.0	16,024	16,241	15,947
Federal	2,726	2,749	- 0.8	2,772	2,886	2,773
State & local	13,015	13,159	- 1.1	13,253	13,375	13,174

(p) preliminary, seasonally adjusted.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment by Industry & Occupation (continued)

Interest-rate sensitive industries, such as construction and automotive, were the first to be hit by the current recession, but by late 1981 the weakness had spread to much of the rest of the economy, including the services section. The deterioration in the labor market became more pervasive as slackening sales and growing inventories forced firms to curtail new orders, cutback production and layoff workers.

As of November 1982, total employees on nonagricultural payrolls numbered 88.7 million. This was 2.5% below the total of 91.1 million a year earlier. Employment in the goods-producing area was down 8.3%; in service-producing, down 0.3%.

In 1981, 42.9% of all male workers were white collar workers, compared with 39.8% in 1972. Comparable figures for female workers were 65.9% and 60.9%, respectively. Overall, 44.8% of civilian employment was in the white-collar classifications. According to Bureau of Labor Statistics projections more than half of the U.S. labor force will be in white-collar occupations, with growth fastest in professional and technical occupations.

According to the Women's Bureau of the U.S. Department of Labor, women continue to constitute a large proportion of workers in traditional occupations. They were 80% of all clerical workers in 1981 but only 6% of all craft workers; 62% of service workers but only 45% of professional and technical workers; 63% of retail sales workers, only 28% of nonfarm managers and administrators.

Employment by Industry & Occupation, by Sex

Industry of the Employed, by Sex, Annual Averages, 1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Total employed, 16 years & over	57,397	43,000	50,630	31,072
Agriculture, forestry, etc.	2,824	694	2,941	644
Mining	949	170	556	41
Construction	5,566	494	4,955	291
Manufacturing, total	14,906	6,911	14,296	5,570
Durable goods	9,798	3,368	9,228	2,340
Nondurable goods	5,108	3,543	5,068	3,230
Food & kindred products	1,262	518	1,272	454
Textile mill products	366	377	509	435
Apparel & other finished textile products	277	985	307	1,096
Printing, publishing, allied industries	927	667	803	416
Chemicals & allied products	929	356	848	252
Other nondurable goods	1,346	640	1,324	576

(continued)

Employment by Industry & Occupation, by Sex (continued)

Industry of the Employed, by Sex, Annual Averages, 1972, 1981
(In Thousands)
(continued)

	1981		1972	
	Male	Female	Male	Female
Transportation, communication & other public utilities	4,875	1,758	4,336	1,126
Wholesale & retail trade	10,907	9,617	9,558	6,991
Wholesale trade	2,981	1,034	2,393	667
Retail trade	7,926	8,583	7,718	8,410
Dept. stores & mail order estabs.	618	1,485	666	1,371
Grocery stores	1,288	1,066	1,125	719
Motor vehicle dealers	691	125	729	93
Apparel, access. stores, excl. shoe stores	156	534	179	400
Eating & drinking places	1,885	2,729	1,161	1,708
Other retail trade	3,378	2,644	3,305	1,954
Financial, insurance, real estate	2,545	3,588	2,172	2,155
Service industries, total	11,477	17,884	8,722	13,027
Professional & related services (health, teaching, etc.)	6,936	13,265	5,404	9,050
Public administration	3,348	1,884	3,093	1,306

Source: U.S. Bureau of the Census
Current Population Reports,
Series P-20, No. 374.

Occupation of Employed Civilians by Sex, Annual Averages--1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Total employed, 16 years & over	57,397	43,000	50,630	31,072
Occupation:				
White-collar workers	24,607	28,341	20,175	18,915
Professional, technical & kindred	9,100	7,319	6,957	4,502
Engineers	1,470	67	1,093	9
Health workers	1,010	2,115	733	1,155
Teachers, except college & university	940	2,257	853	1,988
Other professional, technical & kindred	5,680	2,880	4,278	1,350
Managers & administrators, except farm	8,372	3,168	6,621	1,410
Salaried	6,904	2,672	5,242	1,064
Self-employed in retail trade	560	310	693	240
Self-employed, except retail trade	908	185	686	105

(continued)

Employment by Industry & Occupation, by Sex (continued)

Occupation of Employed Civilians by Sex, Annual Averages--1972, 1981
(In Thousands)

	1981		1972	
	Male	Female	Male	Female
Sales workers	3,509	2,916	3,127	2,226
Retail trade	1,191	2,072	1,207	1,900
Other industries	2,318	844	1,920	326
Clerical & kindred workers	3,626	14,938	3,470	10,777
Secretaries, stenographers & typists	82	4,939	79	4,016
Other clerical & kindred	3,544	9,999	3,391	6,761
Blue-collar workers	25,432	5,828	23,800	4,776
Craft & kindred	11,859	802	10,424	386
Construction craft	3,646	69	3,274	19
Mechanics & repairers	3,345	63	2,746	22
Metal craft	1,239	54	1,080	15
Blue-collar supervisors, n.e.c.	1,610	206	1,314	98
Other craft & kindred	2,020	410	2,009	232
Operatives, except transport	6,350	4,190	6,351	3,989
Durable goods manufacturing	3,035	1,570	3,130	1,284
Nondurable goods manufacturing	1,404	1,935	1,489	2,069
Other industries	1,911	685	1,732	636
Transport equipment operatives	3,167	309	3,075	134
Drivers, motor vehicles	2,681	285	2,620	130
Other transport equipment operatives	487	24	454	4
Laborers, except farm	4,056	527	3,950	267
Construction	781	16	872	4
Manufacturing	839	147	917	92
Other industries	2,437	363	2,162	171
Occupation:				
Farm Workers	2,260	490	2,526	543
Farmers & farm managers	1,317	168	1,588	100
Farm laborers & supervisors	943	322	938	443
Service Workers	5,097	8,342	4,128	6,838
Service workers, except private household	5,059	7,332	4,094	5,435
Food service workers	1,581	3,101	986	2,277
Protective service workers	1,311	148	1,079	65
Other service workers, except private household	2,167	4,083	2,029	3,093
Private household workers	38	1,010	34	1,403

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374

LABOR FORCE, EMPLOYMENT & EARNINGS

Full-time & Part-time Workers

Of 51.1 million men at work in nonfarm occupations in 1981, according to the Bureau of Labor Statistics, 88.7% were on full-time schedules, 11.2% were on part-time schedules--including 4.0% for economic reasons, 7.2% on a voluntary basis. Among 38.9 million women counted at work in 1981 in nonfarm occupations, 71.4% were on a full-time basis, 28.2% were on part-time--including 6.0% for economic reasons and 22.4% who were voluntarily on a part-time work schedule.

Earnings

In the third quarter of 1982, 41.1 million families--66% of all U.S. families--had earnings exclusively from wages or salaries. An additional 14% either had earnings solely from self-employment or combined self-employment with wage and salary earnings. Largely because of increased unemployment, the numbers of families with no earners rose by almost 800,000 over the year to 12.1 million.

The average workweek of production or nonsupervisory workers on private nonagricultural payrolls, at 34.7 hours in the January-November 1982 period, edged down from an average 35.2 hours in 1981, 35.3 hours in 1980. The downward drift was noted in all types of activities with the exception of financial, insurance and real estate and services, where the 1980 and 1981 levels were maintained in 1982.

The Labor Department reported that weekly earnings of U.S. workers averaged $272.14 in December 1982. The average was up 0.5% compared with November after adjustment for inflation and seasonal factors. Earnings in November 1982 rose 0.1% after declining for five consecutive months. For the year 1982, inflation-adjusted weekly earnings declined 0.1%. In 1981 these earnings fell 2.4%.

While many of the 3.6 million people covered by union contracts expiring in 1983 could get better-than-average increases, economists generally predict that the year's average hourly earnings gain will be close to 1982's 5.5%, which was the lowest since 1967. Many nonunion workers face prospects of smaller raises or bonuses.

Average Weekly Earnings & Hours of Production & Nonsupervisory Workers on Private Nonagricultural Payrolls, by Industry Division
(Includes both full-time & part-time workers)

	Average Weekly Earnings			Average Weekly Hours		
	Jan.-Nov. 1982	1981	1980	Jan.-Nov. 1982	1981	1980
Total	$266.07	$255.20	$235.10	34.7	35.2	35.3
Mining	460.29	439.19	397.06	42.6	43.7	43.3
Construction	422.95	398.52	367.78	36.7	36.9	37.0
Manufacturing	330.13	318.00	288.62	38.8	39.8	39.7
Transportation, public utilities	399.72	382.18	351.25	38.9	39.4	39.6
Wholesale & retail trade	198.34	190.95	176.46	31.9	32.2	32.2
Financial, insurance, real estate	244.87	229.05	209.60	36.2	36.3	36.2
Services	224.69	208.97	190.71	32.6	32.6	32.6

Source: U. S. Bureau of Labor Statistics

Earnings (continued)

For men working full-time, median weekly earnings in 1981 were $347. For women, the median was $224, or 65% of that for men. Among the factors involved in this difference, it is noted by the Bureau of Labor Statistics that men worked more hours than women, even within the full-time employment universe and, more importantly, were generally more concentrated within high-pay occupations, including such fields as management and administration, professional and technical work, and the various crafts. Women, on the other hand, tend to be more concentrated in such lower-paying fields as clerical and service jobs, despite the fact that the average woman worker is as well educated as the average man worker--both having completed a median of 12.7 years of schooling as of March 1982.

However, male-female gaps in earnings prevail even within each occupation. An analysis of Current Population Survey data by the BLS also shows that the average weekly earnings of women reach a peak at a younger age than do the earnings of men. Over the past 14 years, the overall sex-earnings ratio has changed very little. It was 62% in May 1967 and had risen only to 64% by the second quarter of 1981.

Median Weekly Earnings of Full-Time Wage & Salary Workers, Men & Women, by Age & by Occupation, 1981 Average

(All races)

	Total	Men	Women
Total, for workers 16 years & over	$289	$347	$224
16 to 24 years	204	225	134
25 years & over	316	378	237
25 to 34 years	302	346	242
35 to 44 years	335	406	241
45 to 54 years	329	408	231
55 to 64 years	317	386	227
65 years & over	227	270	190
Occupation:			
Professional/technical	377	439	316
Managers/administrators	407	466	283
Salesworkers	306	366	190
Clerical workers	233	328	220
Craft & kindred workers	352	360	239
Operatives, exc. transport	242	298	187
Transport equip. operators	303	307	237
Nonfarm laborers	238	244	193
Service workers	192	238	165
Farmworkers	179	183	148

Source: U.S. Bureau of Labor Statistics, Monthly Labor Review (April 1982)

Earnings (continued)

There is a wide difference in earnings among whites, blacks and Hispanics. In 1981, the overall median weekly earnings (full-time workers) of blacks were 80% of the overall median for whites; and the median for Hispanics was 77% of that for whites.

The greatest racial and ethnic difference in earnings were among men 25 years and over. Within this group, the medians for blacks and Hispanics were about 75% of that for whites. Among women, the racial-ethnic differences were much smaller.

In 1978, the median wage or salary income of women who worked was $5,358, as compared with a median of $12,092 for men. In 1980 the median for women was up 27%, reaching $16,804. The median for men rose 16.5%, reaching $14,091.

Size of Wage/Salary Income of Persons 15 Years Old & Over, 1980
(Number of persons in thousands, as of March 1981)

	Men		Women	
	Number	Percent	Number	Percent
Total with wage/salary income	60,140	100.0%	49,321	100.0%
Under $5,000/year	12,454	20.7	19,669	39.9
$ 5,000 - $ 9,999	8,927	14.8	13,536	27.4
$10,000 - $14,999	10,255	17.1	9,664	19.6
$15,000 - $24,999	17,585	29.2	5,658	11.5
$25,000 - $34,999	7,142	11.9	614	1.2
$35,000 & above	3,776	6.3	179	0.4
Median income	$14,091		$6,804	
Mean income	15,611		7,695	
Total with no wage/salary income (thousands)	22,808		41,812	

Source: U.S. Bureau of the Census,
Current Population Reports,
(Series P-60, No. 132) (July 1982).

The trend to multi-earner households was a major development in the 1970's, and by 1980 44% of all households in the U.S. had two or more wage or salary earners.

Number of Earners in U.S. Households, 1980

	Households		Median Earnings
	Number (000)	%	(Wages/Salaries)
Total households	82,368	100.0	
With earnings*	65,724	79.8	$ 18,913
Family households	60,309	73.2	20,867
Number of earners			
None	7,966	9.7	--
One	18,475	22.4	12,771
Two	25,160	30.5	22,791
Three	5,854	7.1	29,409
Four or more	2,854	3.5	36,448

(continued)

Earnings (continued)

Number of Earners in U.S. Households, 1980 (continued)

	Households Number (000)	Households %	Median Earnings (Wage/Salaries)
Nonfamily households, total	22,059	26.8	$ 12,497
Number of earners			
None	8,476	10.3	--
One	11,064	13.4	11,325
Two	2,213	2.7	20,211
Three	254	0.3	27,592
Four or more	52	0.1	nr

nr - not reported

* Excludes those with no wage or salary earners and those in which the person maintaining the household is either self-employed or in the Armed Forces.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-60, No. 132)

However, the high rate of unemployment prevailing in 1982 is reflected in a downturn in the number of families with two or more earners. In the second quarter of 1982, according to the Bureau of Labor Statistics, the number of such families declined 3.3% compared with the number in the same 1981 period. Families with two or more earners accounted for 45.8% of all families with earners in the second quarter of 1982, compared with 46.5% in the second quarter of 1981.

While median weekly earnings of all families with earnings in the 1982 period in terms of current dollars were up 5.7% compared with the second quarter 1981, on a constant dollar basis--eliminating the effects of inflation--the typical figure declined by 0.8%.

Number of Earners by Type of Family, Second Quarter 1982

	Number of Families, 2nd Qtr. 1982			Median Weekly Earnings		
	Thous.	% of Total	% Change/ 2nd Qtr. 1981	Current $	% Change/2nd Qtr. 1981 Current $	Constant $
Total families with earners*	40,931	100.0	- 1.8%	$455	+ 5.7%	- 0.8%
Married-couple families	33,235	81.2	- 2.2	500	+ 7.2	+ 0.6
One-earner	14,490	35.4	- 0.8	345	+ 4.0	- 2.5
Husband	11,426	27.9	- 4.0	393	+ 6.1	- 0.5
Wife	2,404	5.9	+17.4	201	+12.6	+ 5.6
Other family member	606	1.6	+11.3	190	+ 4.3	- 2.2
Two or more earners	18,746	45.8	- 3.3	618	+ 7.4	+ 0.8
Husband & wife	15,930	38.9	- 3.7	622	+ 7.6	+ 1.0
Husband & other family member(s)	2,235	5.5	- 1.3	646	+ 7.6	+ 1.0
Wife & other family member(s)	446	1.1	--	375	+ 1.8	- 4.5
Other family member(s) only	134	0.3	- 5.6	396	- 5.1	-11.0

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Earnings (continued)

Number of Earners by Type of Family, Second Quarter 1982
(continued)

	Number of Families, 2nd Qtr. 1982			Median Weekly Earnings		
		% of	% Change/	Current	% Change/2nd Qtr. 1981	
	Thous.	Total	2nd Qtr. 1981	$	Current $	Constant $
Families maintained by females	5,891	14.4	+ 0.4%	$253	+ 5.0%	- 1.5%
One earner	4,185	10.2	--	207	+ 4.0	- 2.4
Householder (Hhld. head)	3,328	8.1	- 0.3	214	+ 5.5	- 1.0
Other family member	857	2.1	+ 1.1	185	+ 0.5	- 5.7
Two or more earners	1,706	4.2	+ 1.5	417	+ 6.3	- 0.2
Families maintained by males	1,805	4.4	- 0.7	419	+11.9	+ 5.0
One earner	1,098	2.7	- 4.9	346	+11.5	+ 4.6
Two or more earners	707	1.7	+ 6.8	556	+ 5.1	- 1.4

* Excludes families in which there are no wage or salary earners or where the person maintaining the family is either self-employed or in the Armed Forces.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (October 1982)

INCOME

Personal

The following table outlines personal income and spending in current dollars, as well as constant dollars (eliminating the effects of inflation), for the years 1980, 1981, and 1982.

Personal Income & Its Disposition, 1980-1982
(Billions of Dollars)

				Percent Change	
	1982(p)	1981	1980	1982/1981	1981/1980
Personal income	$2,569.7	$2,415.8	$2,160.4	+ 6.4%	+11.8%
Less: Personal tax & nontax payments	397.2	386.7	336.3	+ 2.7	+15.0
Equals: Disposable personal income	2,172.5	2,029.1	1,824.1	+ 7.1	+11.2
Less: Personal outlays	2,031.4	1,898.9	1,717.9	+ 7.0	+10.5
Personal consumption expends.	1,972.0	1,843.2	1,667.2	+ 7.0	+10.6
Durable goods*	242.7	234.6	214.3	+ 3.4	+ 9.5
Nondurable goods*	762.7	734.5	670.4	+ 3.8	+ 9.6
Services	966.6	874.1	782.5	+10.6	+11.7
Interest paid by consumers to business	58.6	55.1	49.9	+ 6.3	+10.4
Personal transfer payments to foreigners (net)	0.9	0.6	0.8	+50.0	-25.0
Equals: Personal saving	141.1	130.2	106.2	+ 8.4	+22.6

(continued)

Personal (continued)

Personal Income & Its Disposition, 1980-1982
(Billions of Dollars)
(continued)

	1982(p)	1981	1980	Percent Change 1982/1981	Percent Change 1981/1980
Addenda					
Disposable personal income:					
Total, bils. of 1972 dollars	1,055.0(e)	1,043.1	1,018.0	+ 1.1%	+ 2.5%
Per capita:					
Current dollars	9,362	8,827	8,011	+ 6.1	+10.2
1972 dollars	4,545(e)	4,538	4,471	+ 0.1	+ 1.5
Population (millions)	232.1	229.9	227.7	+ 1.0	+ 1.0
Personal saving as a % of disposable personal income	6.5	6.4	5.8	--	--
Personal consumption expenditures					
Total, bils. of 1972 dollars	957.3(e)	947.7	930.5	+ 1.0	+ 1.8
Durable goods	138.7(e)	140.0	137.1	- 0.9	+ 2.1
Nondurable goods	364.9(e)	362.4	355.8	+ 0.7	+ 1.8
Services	453.7(e)	445.2	437.6	+ 1.9	+ 1.7

(p) = preliminary (e) = estimated

* Durable goods is defined as goods which has a useful lifetime of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

The year 1982 was marked by a continuance of the recession which got underway in July 1981 with layoffs. Total personal income amounted to $2,570 billion, 6.4% over the 1981 total. This compares with an 11.8% rise in personal income in 1981 over 1980. The 1982 gain was the smallest since the 5.1% rise reported for the year 1963.

Disposable, or after-tax, income rose 7.1% in 1982 to $2,173 billion, after increasing 11.2% in 1981. Income from wages and salaries increased 4.4% in 1982, less than half the 10.2% rise for 1981 over 1980. This was the lowest yearly gain since the 2.8% in 1961. However, there was a 61% increase in Government payments for unemployment compensation--from about $15.4 billion in 1981 to $24.9 billion in 1982.

Personal consumption expenditures for all of 1982 were up 7% over the 1981 total. This compares with a 10.6% gain in spending in 1981, and it was the smallest annual gain since the 6.9% rise in 1970, according to the Department of Commerce.

INCOME

Personal (continued)

Personal savings for the year 1982 rose 8.4%, to $141.1 billion, leaving a national saving rate of 6.5%, up from 6.4% in 1981. The rate measures new savings as a percentage of disposable income. For the month of December 1982 the savings rate was 5.8%, up from 5.5% the previous month.

Much of the increase in income reported for 1982 lies in transfer payments, which include Social Security and unemployment benefits. These represented 14.6% of total income in 1982, up from 13.9% in 1981. The fact that many people may exhaust unemployment benefits is a factor in the outlook for income levels in coming months, although extensions are being made in benefit periods.

Another factor in the outlook is the trend in interest rates which started downward in mid-1982. In 1971 interest income represented less than 3% of total personal income; by 1982 it accounted for 14.5%. Individuals have been the main beneficiaries of the runup in interest rates, but as rates decline they are likely to be the major losers. The bulk of their assets takes the form of time and savings deposits ($1.4 trillion outstanding at year end 1981) and money market funds, Treasury bills, and other short-term investments ($300 billion outstanding, according to the Morgan Guaranty Survey, December 1982).

The recent decline in interest rates (and a small further decline projected for 1983 by The Morgan Bank) means that interest income in 1983 is likely to be flat. A flat pattern would reduce the rate of total personal income growth more than one percentage point in the short term. (In the longer term, however, lower interest rates can be expected to stimulate employment and to generate wage and salary income.)

In addition to weaker interest earnings, many individuals in 1983 are likely to face rising interest expense. The average rate on outstanding mortgages in 1982 was still below 11%, but this will rise in 1983 as old, low-yielding loans are replaced by 12% and 13% mortgages.

Wages and salaries amounted to $1,506.1 billion in 1982. A gain of only 4.4% was registered over 1981 compared with a rise in wages and salaries of 10.2% in 1981 compared with 1980. Wage and salary disbursements have been taking a decreasing share of total personal income, dropping to 60.7% in 1982 compared with 63.8% in 1980.

With the inflation rate low and joblessness high, working Americans can expect another year of modest pay raises. Economists predict 1983's average hourly earnings gain will be close to last year's 5.5%, which was the lowest rate since 1967 and well below the 9.3% increase typical only two years ago. A lower rate, however, is an important factor in controlling inflation.

Personal (continued)

Distribution of Personal Income by Source, 1980-1982

	1982	1981	1980
Total personal income	100.0%	100.0%	100.0%
Wage & salary disbursement	60.7	61.8	62.8
Other labor income*	6.0	5.8	5.9
Proprietors' income			
Farm	0.7	1.0	0.9
Nonfarm	3.9	4.2	4.5
Rental income	1.3	1.4	1.5
Dividends	2.6	2.6	2.6
Personal interest income	14.5	13.6	12.2
Transfer payments (Social security, unemployment & other benefits)	14.6	13.9	13.8
Less: Personal contributions for social insurance	4.3	4.3	4.2

* Employer contributions to private pension, health and welfare funds; workmen's compensation, directors' fees and a few minor items.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

In the month of December 1982, alone, wages and salaries represented less than 60% of total personal income; transfer payments accounted for 15.2%; personal interest income, 14.3%.

According to a U.S. Census Bureau survey, while income for males declined significantly in real terms (after adjustment for inflation) between 1979 and 1980, the incomes of females remained stable. In real terms, the median income for men decreased by 6.3% compared with 1979. Significant declines in real income were noted for men in the Northeast, North Central and South, while median income (constant dollars) in the West showed no significant change from 1979.

Women in the Northeast experienced a 3.7% decline in real median income, while women in the South showed a 4.2% increase in 1980 compared with 1979. Overall, as noted, there was practically no change.

The U.S. Census Bureau reports that nearly all (94.8%) males aged 15 and over had some money income in 1980, compared with 88.7% of females 15 and older. The age group 45-54 years had the largest percentage of their total number with incomes in the higher income bracket ($25,000 and above). This held true for both men and women, but among men 33.9% age 45-54 had money income of $25,000 or more; among women, only 3.2%.

The median income (current dollars) for men 15 years of age and over in 1980 was $12,530 compared with $11,845 in 1979, $6,670 in 1970. Comparable figures for women were $4,920, $4,354 and $2,237.

INCOME

Personal (continued)

Distribution of the Population 15 Years of Age & Over By Total Money Income in 1980, by Sex & Age

		Age Group				
Men	Total	15-19	20-24	25-44	45-54	55 & over
Total (thous.)	82,949	10,140	10,300	31,431	10,839	20,238
Without income (thous.)	4,288	2,979	490	488	137	195
With income (thous.)	78,661	7,161	9,810	30,943	10,703	20,043
Income	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	21.4	82.7	30.6	8.7	8.7	21.2
$ 5,000 to $ 9,999	18.6	13.4	30.4	13.2	10.8	27.0
$10,000 to $14,999	17.1	3.0	22.4	19.5	15.0	17.0
$15,000 to $19,999	14.2	0.5	10.6	20.1	15.6	11.0
$20,000 to $24,999	11.3	0.3	4.3	16.6	16.0	8.1
$25,000 to $29,999	7.0	--	1.0	9.5	13.0	5.4
$30,000 & over	10.4	0.1	0.7	12.4	20.9	10.3
Women						
Total (thous.)	91,133	10,058	10,685	32,585	11,653	26,153
Without income (thous.)	10,307	3,278	1,088	3,246	1,272	1,421
With income (thous.)	80,826	6,780	9,596	29,338	10,381	24,731
Income	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Under $5,000	50.6	88.2	47.9	40.7	42.7	56.4
$ 5,000 to $ 9,999	24.3	10.0	33.2	24.0	24.7	24.9
$10,000 to $14,999	14.3	1.5	14.7	19.6	16.7	10.1
$15,000 to $19,999	6.4	0.1	3.2	9.6	9.0	4.5
$20,000 to $24,999	2.6	0.1	0.7	3.7	3.7	2.2
$25,000 to $29,999	0.9	--	0.2	1.2	1.4	0.9
$30,000 & over	1.0	--	0.1	1.2	1.8	1.0

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 132 (July 1982).

Personal (continued)

Median Total Money Income by Sex & by Age (15 Years & Over), 1980
Total With Money Income & Year-Round, Full-Time Workers

	Men & Women		Men		Women	
Age	Total	Full-Time Workers	Total	Full-Time Workers	Total	Full-Time Workers
Total	$ 7,944	$15,838	$12,530	$19,173	$ 4,947	$11,703
15 - 19 years	1,736	7,255	1,801	7,753	1,685	6,759
20 - 24	6,612	10,773	7,923	12,109	5,564	9,456
25 - 29	10,724	14,611	13,987	16,466	7,482	12,123
30 - 34	11,770	16,795	17,234	19,282	6,295	12,559
35 - 39	12,333	18,682	19,941	21,605	5,939	12,868
40 - 44	12,163	18,233	20,132	21,990	6,625	12,278
45 - 54	11,927	18,082	19,974	22,414	6,426	12,209
55 - 64	13,030	17,476	15,914	21,053	5,059	12,174
65 - 69	6,150	15,647	8,953	17,532	4,558	12,925
70 & over	4,872	14,963	6,545	16,712	4,341	11,937

Source: U.S. Bureau of the Census,
Current Population Reports, Series P-60, No. 132
(July 1982)

Household

The average American household experienced a significant decline in real income between 1979 and 1980, according to the latest detailed information published by the Census Bureau based on the March 1981 Current Population Survey. The 1980 median household income of $17,710 was 7.6% over the 1979 median. However, after adjusting for a 13.5% increase in the cost of consumer goods, real median household income declined by 5.2% between 1979 and 1980. The 1980 median household income for whites was $18,650; for black households, $10,760; $13,650 for those of Spanish origin. All three groups showed real declines in income from 1979.

Data on households cover all persons who occupy a housing unit. Family data, on the other hand, cover a group of two or more persons who are related and residing together--one of these being the householder (formerly designated household head). The 1980 median family income was $21,020 in current dollars, up 7.3% compared with the 1979 median. However, after adjustment for inflation there was a net decline of 5.5% in real median family income. This represents the first statistically significant annual decline in real family income since 1974-1975 and the largest decline recorded in the post-World War II period. Median family income for 1980 was about $1,330 lower than the 1973 median ($22,350) in constant dollars.

A dollar in 1982 had only about 45% of the purchasing power that a dollar had in 1970. According to The Conference Board if a family had a $10,000 income in 1970 (which was then about average) it needed about $23,425 in 1982 to have the same after-tax real purchasing power it had then. The share of this hypothetical

INCOME

Household (continued)

family's income taken by federal income taxes has risen from 9.9% in 1970 to 12% this year, while Social Security taxes have gone from 3.7% to 6.7%. (These calculations do not take into consideration any state-local taxes which vary greatly.)

A special study by the Census Bureau, released in September 1982 (Changing Family Composition and Income Differentials) concludes that changes in family composition, particularly the increasing proportion of families maintained by women with no husband present (up from 9% of the total in 1970 to 12% in 1980 for whites, from 31% to 42% for blacks), have resulted in declining income levels and increasing poverty rates for families. The study provides hypothetical estimates of the effect of the family composition changes on income and poverty levels. (For those concerned with such adjustments, see Census Bureau report, Special Demographic Analysis, CDS-80-7.)

More than 15% of the 82.3 million households in the U.S. in March 1981 had incomes of $35,000 or more, a much higher percentage than the 3.8% measured in 1975 and the 1.4% in 1970. These upper-income households accounted for 37% of all income flow to consumers.

The percentage of households in the lower income brackets (under $10,000) fell dramatically between 1970 and 1980, nose-diving from 57.7% to 27.5% of all households. Households with incomes under $15,000 represented more than 42% of all households in 1980, but accounted for only 16% of total income.

Distribution of Households by Total Money Income 1970, 1975, 1980

	1980	1975	1970
Total Households (thousands)	82,368	72,867	64,778
Percent	100.0%	100.0%	100.0%
Income (Current Dollars)			
Under $10,000	27.5	42.3	57.7
$10,000 - $14,999	14.5	20.5	23.2
$15,000 - $19,999	13.3	15.9	11.2
$20,000 - $24,999	12.2	9.6	3.9
$25,000 - $34,999	16.5	7.8	2.6
$35,000 & over	15.6	3.8	1.4
Median Income (current $)	$72,710	$11,800	$ 8,734
Mean Income (current $)	$21,063	$13,779	$10,001

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-60, No. 132 (July 1982)

In 1980, total aggregate money income of households in the U.S. amounted to $1,734.9 billion, 14% higher than the $1,522.1 billion registered in the previous year. Following a trend of the last several years the percentage of total income garnered by married-couple households has fallen between 1979 and 1980, down from 75.6% to 74.4%.

INCOME

Household (continued)

Households in the Western region of the U.S. had the highest income of any region of the country--$19,009, which was 7.3% above the national average. The Southern region was the only one to register a median household income below the national average, having a median income of $16,298.

Households headed by a college graduate account for 18.5% of the population but for 28.5% of the total income available to consumers.

Despite the slowing growth in the number of unrelated individuals, their incomes are projected to grow faster than family incomes, according to American Demographics. Average income for unrelated individuals should rise 34% between 1981 and 1995 (in 1981 dollars). The average income of families should rise 29%.

According to this source, in 1981, 50% of all unrelated individuals had incomes below $10,000. By 1995, this proportion should fall to 40% (in 1981 dollars). The share of unrelated individuals with incomes of $30,000 or more should rise from 5% in 1981 to 12% by 1995. Comparable figures for families indicate a rise from 35% of the total with incomes of $30,000 or more to 50%.

Number, Per Capita Income & Aggregate Money Income in 1980 Of Households by Selected Characteristics

	All Households		Av. # of Persons Per Hshld.	% of Aggregate Income	Per Capita Income
	Number (000)	%			
Total	82,368	100.0%	2.73	100.0%	$ 7,720
By region:					
Northeast	17,781	21.6	2.73	22.0	7,865
North Central	21,200	25.7	2.73	26.0	7,775
South	27,200	33.0	2.75	30.9	7,158
West	16,167	19.6	2.68	21.1	8,457
By marital status & sex of head:					
Male head	58,685	71.2	3.01	83.0	8,151
Married, wife present	47,473	57.6	3.35	71.8	7,823
Married, wife absent	1,440	1.8	1.61	1.5	11,253
Widowed/divorced	4,567	5.5	1.60	4.5	10,984
Single	5,205	6.3	1.53	5.2	11,220
Female head	23,684	28.8	2.03	17.0	6,135
Married, husband present	1,821	2.2	3.09	2.6	8,045
Married, husband absent	2,591	3.2	2.81	1.5	3,591
Widowed/divorced	14,457	17.6	1.84	9.3	6,048
Single	4,816	5.8	1.77	3.6	7,308

(continued)

Household (continued)

Number, Per Capita Income & Aggregate Money Income in 1980 Of Households by Selected Characteristics (continued)

	All Households Number (000)	All Households %	Av. # of Persons Per Hshld.	% of Aggregate Income	Per Capita Income
Size of household:					
One person	18,936	23.0%	1.00	12.0%	$10,981
Two persons	25,787	31.3	2.00	31.1	10,382
Three persons	14,569	17.7	3.00	20.5	8,063
Four persons	12,768	15.5	4.00	19.8	6,733
Five persons	6,117	7.4	5.00	9.9	5,624
Six persons	2,549	3.1	6.00	4.1	4,647
Seven persons or more	1,643	2.0	7.78	2.6	3,508

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 132 (July 1982)

Suburban areas surrounding large cities remained the residence of those households with the highest median income, reaching $23,070 in 1980. Households within large central cities had the largest jump in median income between 1979 and 1980, rising 9.8%. The lowest household income was for households in the nonfarm sector, $14,786.

Median Household Income: Metropolitan/Non-Metropolitan Residence, 1979, 1980

	1980	1979	% Change 1980/1979
All households	$17,710	16,461	+ 7.6%
Metropolitan areas with population 1 million or more	20,016	18,325	+ 9.2
In central cities	15,284	13,924	+ 9.8
Outside central cities	23,070	21,325	+ 8.2
Metropolitan areas with population under 1 million	17,884	16,665	+ 7.3
In central cities	15,979	14,810	+ 7.9
Outside central cities	19,879	18,405	+ 8.0
Outside metropolitan areas, total	15,350	14,339	+ 7.1
Farm	17,783	16,491	+ 7.8
Nonfarm	14,786	15,280	- 3.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-60, No. 132 (July 1982)

INCOME

Household (continued)

As the size of the household increases, the per capita income of the household decreases. However, there are more persons per household at the higher income levels. In 1980, according to the Census Bureau survey, in households with income less than $5,000 there are 1.76 persons. That figure rises with income, peaking at 3.57 in households with incomes of $50,000 and up. Two-person households account for the largest share of aggregate income--31.1% in 1980, up from 30.6% in in 1979.

Distribution of Households & Income by Age of Head, 1980

	(Thousands)		Average Hshold. Size	Distrib. of Total Income	Average Income	
	Households	Persons			Household	Per Capita
Total	82,368	224,723	2.73	$1,734.9	$21,063	$ 7,720
Age of head:	100.0%	100.0%		100.0%		
15-24	7.8	6.4	2.25	5.3	14,227	6,327
25-34	23.3	24.9	2.92	22.9	20,713	7,082
35-44	17.6	23.5	3.65	21.7	26,052	7,131
45-54	15.4	18.7	3.30	20.6	28,169	8,527
55-64	15.4	13.3	2.36	17.2	23,504	9,969
65 & over	20.5	13.1	1.74	12.3	12,628	7,243

Source: U.S. Bureau of the Census,
Current Population Reports,
Series 60, No. 132 (July 1982)

There is a sizeable amount of unreported income. In a study for Business Week by Louis Harris & Associates (BW, Oct. 11, 1982) it was found that as many as 30% of all American households have some member working in the underground economy. The findings indicated that the underground economy in the U.S. may amount to upwards of $400 billion a year.

CONSUMER PRICES

The consumer price index for the month of December 1982 covering all urban consumers (which reflects the purchases of about 80% of the population) rose 3.9%--the official rate of inflation for the year, according to the Bureau of Labor Statistics. This compares with a rise of 9.9% in the 1981 rate and a 12.4% jump in 1980.

There was actually a decline in consumer prices in December of 0.3%, on a seaonally adjusted basis, compared with November 1982. This matches the drop of 0.3% registered in March 1982 compared with February, and was only the second monthly drop since August 1965 in the consumer price index for all urban consumers.

CONSUMER PRICES

About three-quarters of the improvement in the nation's inflation rate in 1982 came from declining mortgage interest costs and a tapering off in energy price increases. Up sharply, however, were medical costs.

Percent Change in Consumer Price Index for All Urban Consumers
Month of December - Year to Year

	December 1982/1981	December 1981/1980
All items	+ 3.9%	+ 8.9%
Selected items		
Food	+ 3.2	+ 3.6
Housing	+ 3.6	+16.2
Mortgages	-12.5	+18.9
Energy	+ 1.3	+11.9
Apparel	+ 1.6	+ 6.2
Transportation	+ 1.7	+11.5
Medical care	+11.0	+12.8

Source: U.S. Bureau of Labor Statistics

Economists both in and outside of government believe prices may start to rise faster in 1983, and the inflation rate accelerate if federal budget deficits are not brought under control, a condition that appears to be unlikely at this stage.

Producer (or factory) prices of finished goods in 1982 increased 3.5% over 1981. This compares with a 7.1% advance in producer prices in 1981, according to the Bureau of Labor Statistics.

CONSUMER CREDIT

At the end of November 1982, outstanding consumer installment credit expanded at a 9% annual rate in November compared with a 2% rate in the third quarter, according to the Federal Reserve Board. For all of 1981, installment credit increased 6.3%. The increase of $2.52 in consumer installment credit in November (seasonally adjusted) followed a decline of $324 million in October and a rise of $1.09 in September. The November rise was the largest since a $9.98 billion increase reported for September 1981.

The big jump in November reflected a sharp rise in auto sales that month, as the pace of sales quickened when auto makers started offering cut-rate financing on left-over 1982 models. This pace has slackened, however. December 1982 auto sales decreased 4.1% compared with the 12.5% rise in November over the October seasonally adjusted rate. While sales decreased from November to December, auto sales were up 25.8% from the December 1981 rate.

Further declines in consumer finance rates are needed to spur spending on items other than cars, and the outlook in this direction appears to be favorable. As this develops, along with improvement in consumer confidence, consumers are expected to step up the level of buying of durables, drawing to a large extent on credit.

CONSUMER CREDIT

The Fed's report on consumer debt showed that new credit extended in November rose 12.6% to a new high, an adjusted $31.61 billion from $28.06 billion in October 1981. Repayments and other liquidations rose 2.5% in November to an adjusted $29.09 billion, also a new high. At the end of November consumer installment debt totaled $336.99 billion, up 2.4% from a year earlier.

Total Consumer Installment Credit Outstanding At End of Period
By Major Type of Credit
(Millions of Dollars)

	End of Nov. 1982	1981	1980	1979
Outstanding installment credit	$336,991	$333,375	$313,472	$312,024
By Major Holder:				
Commercial banks	148,270	149,300	147,013	154,177
Finance companies	93,462	89,818	76,756	68,318
Credit unions	46,832	45,954	44,041	46,517
Retailers*	27,637	29,551	28,448	28,119
Savings & loans	13,672	11,598	9,911	8,424
Gasoline companies	4,141	4,403	4,468	3,729
Mutual savings banks	2,975	2,751	2,835	2,740
Net change in amount (Seasonally adjusted) outstanding during period	2,523	19,894	1,448	38,381
By Major Holder:				
Commercial banks	904	2,284	-7,163	18,161
Finance companies	1,133	13,062	8,438	14,020
Credit unions	418	1,913	-2,475	2,185
Retailers*	- 98	1,103	329	2,132
Savings & loans	194	1,682	1,485	1,327
Gasoline companies	- 39	- 65	739	509
Mutual savings banks	11	- 85	95	47

*Includes auto dealers and excludes 30-day charge credit held by travel and entertainment companies.

Source: Board of Governors of the Federal Reserve System, (G-19).

Although in the month of November 1982 gains were registered in outstanding credit, the rise was not strong enough to offset the weak consumer spending trend prevailing in 1982. Consumer credit had grown only 2.4% since November 1981 which was well below the inflation rate. In all of 1981, according to the Federal Reserve Board, consumer credit grew by 6.7%.

Consumer credit is watched carefully as a leading indicator of the direction in which future consumer spending is headed. A burst of borrowing can, at times, be followed by "retrenching," or a rise in repayments. When consumers increase payments there is less disposable income within the economy and thus a rise in inventories and a cutback in industrial production is likely to result.

PERSONAL CONSUMPTION EXPENDITURES

For the year 1982, personal consumption expenditures, which represented about 64% of gross national product and about 91% of disposable personal income, totaled $1,972 billion (in current dollars). This was 7.0% over 1981, representing the smallest gain since the 6.9% rise reported for 1970 over 1969, according to the Department of Commerce.

Personal Consumption Expenditures, 1980-1982
(Total & Selected Expenditure Groups)

	Billions of Dollars			% of Total		% Change	
	1982(p)	1981	1980	1982	1981	1982/81	1981/80
Total expenditures	$1,972.0	1,843.2	1,667.2	100.0%	100.0%	+ 7.0%	+10.5%
Durable goods	242.7	234.6	214.3	12.3	12.7	+ 3.4	+ 9.4
Motor vehicles & parts	107.1	98.6	89.7	5.4	5.3	+ 8.6	+ 9.9
Furniture, household equip.	92.8	93.4	86.3	4.7	5.1	- 0.6	+ 8.2
Nondurable goods	762.8	734.5	670.4	38.7	39.8	+ 3.8	+ 9.6
Food	397.8	375.3	343.7	20.2	20.4	+ 6.0	+ 9.1
Clothing & shoes	118.6	114.6	104.7	6.0	6.2	+ 3.5	+ 9.4
Gasoline & oil	93.9	96.8	87.0	4.8	5.2	- 3.0	+11.3
Services	965.8	874.1	782.5	49.0	47.4	+10.5	+11.7
Housing	324.6	295.3	266.0	16.5	16.0	+ 9.9	+11.0

(p) = preliminary
Note: Durable goods is defined as goods having a usefulness of three years or more; nondurable goods, less than three years.

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

On a constant dollar basis, eliminating the effects of inflation, personal consumption expenditures rose only 0.8% in 1982 compared with 1981. The real gain in 1981 was 1.8% over 1980.

Strength in consumer spending is looked upon as the key to economic recovery. Tax cuts plus lower interest rates and a decline in inflation rates are beginning to make themselves felt; however, a depressing factor is the high rate of unemployment. Continued high spending on services is expected to hold down gains in spending for goods.

The Johnson Redbook Service looks for a gain in 1983 of 8.3% in total spending for goods and services in 1983, with the quarterly annual rate rising from a gain of 7.2% in the first quarter to 9.1% in the fourth quarter. Comparable gains expected in spending for goods are 5.1% (for the year), rising from 3.5% to 6.8%.

The Conference Board, in its Economic Forum in December 1982, looked for a rise of 8.2% in personal consumption spending in 1983 on a current dollar basis. The Citibank Economic Forecast Service anticipated that in 1983 real consumer outlays would rise at annual rates of about 4% in the first half, 3% in the second half. The slight deceleration on the second half would reflect a move by the Fed to bring money growth back, according to this source.

PERSONAL CONSUMPTION EXPENDITURES

Durable goods are expected to be the big winners in 1983, rising 8% in real terms, according to the Citibank forecast. It was anticipated that apparel and shoe sales would rise from $84.3 billion (constant dollars) in 1982 to over $87.5 billion in 1983, gaining 3.8%. Gains in housing starts and in housing sales are expected to bring increased demand for many types of household goods.

In analyzing the longer-term outlook on personal consumption expenditures, the Bureau of Labor Statistics expects nondurable items, such as food and household supplies, to continue to grow more slowly than outlays for durable goods and services. This long-term trend reflects the tendency of consumers to spend less of their budget on necessary staples and shift more discretionary income to higher-priced durable goods or services as disposable incomes rise.

Food and tobacco, which together accounted for almost 29% of the personal consumption budget in 1955, are projected to represent only 17% to 19% in 1990. One of the fastest growing categories of spending is expected to be medical care services. This is expected to represent more than 10% of personal consumption expenditures by 1990, up from 8.7% in 1979, due in large part to the aging population.

Other categories of spending projected to rise rapidly include amusements and recreation services, and airline transportation.

A detailed report on consumer spending by major product category is compiled annually by the Bureau of Economic Analysis, U.S. Department of Commerce. This data reflects the value at retail of all goods (new and used) reaching the consumer during the year through regular retail channels, as well as direct sales by manufacturers and wholesalers, and such outlets as prizes, stamp plans, premiums, etc.

Selected categories of spending are covered in the following tables taken from detailed government data.

Personal Consumption Expenditures For Selected Product Categories, 1979-1981
(Millions of Current Dollars)

Selected Categories	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Food & nonalcoholic beverages, total*	$329,063	$299,977	$272,246	+ 9.7%
Food for off-premise consumption**	270,664	248,121	223,360	+ 9.1
Purchased meals & beverages**	97,916	89,414	82,475	+ 9.5
Tobacco products	23,129	20,678	19,258	+11.9
Alcoholic beverages	46,214	43,685	39,326	+ 5.8
Toilet articles & preparations	16,116	14,719	13,600	+ 9.5
Drug preparations & sundries (not including prods. dispensed by doctors, hospitals, etc.)	18,647	17,802	15,754	+ 4.7
Clothing & accessories (not including footwear or jewelry, but including luggage)	95,354	87,286	82,744	+ 9.2
Women's & children's	62,697	56,999	54,088	+10.0
Men's & boys'	32,657	30,287	28,656	+ 7.8
Footwear, total	19,095	17,319	16,291	+10.3
Women's & children's (estimated)	11,150	10,040	9,400	+11.1
Men's & boys (estimated)	7,945	7,279	6,891	+10.7

(continued)

Personal Consumption Expenditures For Selected Product Categories, 1979-1981
(Millions of Current Dollars)
(continued)

	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Jewelry & watches	$ 12,915	$ 11,287	$ 9,537	+14.4%
Home furnishings, household supplies	125,324	115,314	108,364	+ 8.6
Furniture & bedding	19,802	18,615	18,236	+ 6.4
Major appliances, electric housewares	19,253	17,952	16,837	+ 7.2
Dinner & tableware, glassware, utensils	9,673	8,671	7,888	+11.6
Other durable house furnishings#	20,739	19,048	17,978	+ 8.9
Floor coverings	nr	7,162	6,971	--
Semi-durable house furnishings##	10,579	9,553	8,926	+10.7
Home entertainment (TV, radios, records, musical instruments, etc.)	23,906	22,047	20,860	+ 4.8
SUB-TOTAL: Home furnishings, excl. misc. household supplies, etc.	103,952	95,886	90,725	+ 8.4
Misc. household supplies, cleaning preparations, paper products, etc.	21,372	119,428	17,639	+10.0

(r) = revised (nr) = not reported

*Includes expenditures not separately shown, such as the value of food furnished to government and commercial employees, etc.

**Includes alcoholic beverages, and to this extent the figure on consumption of alcoholic beverages shown separately is duplicated.

#Principal furnishings included in "other durable house furnishings" are floor coverings, blankets, comforters, pillows, picture frames, mirrors, art products, lamps, clocks, writing equipment, hand and power tools, garden tools are also included.

##Consists mainly of textile home furnishings except where elsewhere classified, including piece goods for home furnishings. Also includes lamp shades, brooms, and brushes.

Note: Columns may not add to totals shown due to rounding of figures and/or expenditure categories included in totals but not separately reported.

Source: Based on reports from the Office of Business Economics, U.S. Department of Commerce.

PERSONAL CONSUMPTION EXPENDITURES

Personal Consumption Expenditures For Selected Product Categories, 1979-1981
(Billions of Dollars)

Selected Categories	1981(r)	1980(r)	1979(r)	% Change 1981/1980
Food & nonalcoholic beverages, total*	$ 154.2	$ 152.6	$ 149.3	+ 1.0%
Food for off-premises consumption**	131.5	130.5	126.0	+ 0.8
Purchased meals & beverages**	46.8	46.6	47.0	+ 0.4
Tobacco products	14.1	13.6	13.7	+ 3.7
Alcoholic beverages	27.2	27.6	26.8	- 1.4
Toilet articles & preparations	8.3	8.4	8.4	- 1.1
Drug preparations & sundries	10.6	10.7	10.8	- 0.9
Clothing & accessories (not incl. footwear)	70.8	66.6	65.2	+ 6.3
Women's & children's wear	48.5	44.8	43.5	+ 8.3
Men's & boys' wear	22.3	21.8	21.7	+ 2.3
Footwear, total	11.9	11.4	11.5	+ 4.4
Home furnishings	54.9	53.3	53.4	+ 3.0
Furniture & bedding	11.7	11.7	12.5	--
Major appliances, electric housewares	12.2	12.1	11.9	+ 0.8
Dinner & tableware, glassware, utensils & other durable house furnishings#	4.5	4.4	4.5	+ 2.2
Semi-durable house furnishings##	5.8	5.6	5.7	+ 3.6
Home entertainment (TV, radios, records, musical instruments, etc.)	20.7	19.5	18.8	+ 6.2

Note: Columns may not add due to rounding.
See footnotes from preceding table.

(r) = revised

Source: U.S. Department of Commerce,
Office of Business Economics.

RETAIL SALES

Consumer caution and lack of confidence were reflected in the rise of only 3.0% in total retail sales in 1982 compared with 1981. In the previous year sales went up 9.1%. Sales of durable goods stores rose 1.7% in 1982 over 1981, while the nondurable goods store group registered gains of 3.7%.

RETAIL SALES

Retail Sales by Store Type, 1980-1982
(Current Dollars)

	Sales (Billions of $)			% Change	% Change
	1982(p)	1981	1980	1982/81	1981/80
Retail trade, total	$1,070.2	$1,038.8	$951.9	+ 3.0%	+ 9.1%
Durable goods stores, total	332.0	326.6	296.6	+ 1.7	+10.1
Building materials, hardware, garden supply, etc.	50.1	53.2	49.6	- 5.7	+ 7.3
Automotive dealers, auto & home supply stores	189.3	180.7	162.3	+ 4.8	+11.3
Furniture, hfgs., appliance radio, TV stores	44.0	45.7	43.4	- 3.7	+ 5.3
Selected types:					
Furniture stores	nr	18.3	17.5	--	+ 4.6
Appliance, radio, TV stores	nr	14.3	13.2	--	+ 8.3
Jewelry stores	nr	9.5	8.1	--	+17.3
Nondurable goods stores, total	738.2	712.2	655.3	+ 3.7	+ 8.7
General merchandise group	131.5	127.4	117.2	+ 3.2	+ 8.7
Department stores*	108.4	103.7	94.7	+ 4.6	+ 9.5
Misc. general mdse. stores	nr	14.9	13.8	--	+ 8.0
Variety stores	nr	9.0	8.7	--	+ 3.4
Food stores	249.9	237.6	217.0	+ 5.2	+ 9.5
Gasoline service stations	98.1	101.7	93.6	- 3.5	+ 8.7
Apparel, accessory stores	49.2	47.8	44.4	+ 3.0	+ 7.7
Men's, boys' wear stores	nr	7.8	7.8	--	--
Women's ready-to-wear stores	nr	16.4	15.1	--	+ 8.6
Women's accessories/other specialty stores incl. furriers	nr	17.8	16.4	--	+ 8.5
Shoe stores	nr	8.6	7.8	--	+ 9.7
Eating & drinking places	103.6	94.1	85.8	+10.1	+ 9.7
Drug & proprietary stores	34.7	33.0	30.5	+ 5.1	+ 8.2
Liquor stores	nr	17.5	17.1	--	+ 2.3
Non-store retailers**	nr	25.3	23.3	--	+ 8.6
Mail order houses-dept. stores mdse.	nr	261.5	236.4	--	+10.6

(p) = preliminary
nr = not reported
* Data for mail-order catalog desks located within department stores of some mail-order firms are included in the department store estimates.
**Includes mail order, house-to-house & vending machines.

Source: U.S. Bureau of the Census.

RETAIL SALES

On a constant dollar basis, retail sales were down 1.0% in 1982 compared with 1981, according to an analysis by the Johnson Redbook Service.

Retail Sales Trends - Constant Dollars

Percent change:	Total	Durable Gds. Stores	Nondurable Gds. Stores	Retail Total Excl. Auto	Gen. Mdse. Stores	Apparel Stores	Hfgs. Stores
1982/1981	- 1.0%	- 4.1%	- 0.2%	- 1.4%	+ 0.2%	+ 1.2%	- 8.2%
1981/1980	+ 0.9	+ 2.1	+ 1.2	+ 1.0	+ 7.1	+ 8.4	- 0.5

Source: The Johnson Redbook Service.

FAIRCHILD FACT FILES AVAILABLE FOR 1982

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included.

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS): Spotlights statistics information on young adults (25 to 44 years of age) -- the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special Fact File for 1981, $15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special, New Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.48

Men's Furnishings and Work Wear

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Gregory Becker, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

MEN'S FURNISHINGS

Page

AT THE MANUFACTURER LEVEL:

- MARKET TRENDS.......... 1
- GENERAL STATISTICS ON THE INDUSTRY.......... 2
  - EMPLOYMENT AND EARNINGS.......... 5
  - CONCENTRATION IN THE INDUSTRY.......... 6
  - MANUFACTURERS' OPERATING RATIOS.......... 9
  - LOCATION OF THE INDUSTRY..........10
- PRODUCTION..........12
- SHIPMENTS..........16
- PRODUCER PRICES..........20
- FOREIGN TRADE -- IMPORTS..........21
- FOREIGN TRADE -- EXPORTS..........23

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET FOR MEN'S FURNISHINGS..........26
- RETAIL SALES..........27
- RETAIL SALES BY STORE TYPE..........29
- CONSUMER PRICES..........34
- RETAIL ADVERTISING..........35
- CONSUMER BUYING HABITS..........35

MEN'S WORK WEAR

- GENERAL STATISTICS ON THE INDUSTRY..........40
  - EMPLOYMENT AND EARNINGS..........42
  - MANUFACTURERS' OPERATING RATIOS..........43
- LOCATION OF THE INDUSTRY..........43
- PRODUCTION..........44
- SHIPMENTS..........47
- PRODUCER PRICES..........50
- RETAIL SALES..........50
- CONSUMER BUYING HABITS..........52

SCHEDULE OF ADDITIONAL FACT FILES..........53

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications

Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-455-4
Printed in the United States of America

MEN'S FURNISHINGS

Market Trends

The theory that men's furnishings sales trends run counter to trends in the general economy were substantiated in 1982 in many types of men's furnishings. In spite of depressed sales in apparel as a whole, trade reports indicate that the furnishings business grew at a respectable pace. The prevailing logic behind this rise is that in a poor economy men turn to the less expensive purchase of furnishings and accessories to update their wardrobes rather than spend considerably more for a new suit or jacket. Another favorable trend has been the continued interest in dressing up, helped to a great degree by competition in the job market, particularly affecting younger men who account for the major share of the furnishings business.

Private labels are presently the fastest-growing area in men's furnishings. In a report on a recent survey of retailers (Daily News Record, October 26, 1982) an average 30% of inventories in dress shirts were private label. Many analysts see the oversaturation of the market by designer labels as leading to the upsurge in sales of equal-quality, less-expensive private label lines.

Styling and color remain major considerations in consumer preferences in furnishings. Quality also rates high in consumer considerations. The boom in sales of fashion underwear for men, which began in the late 1970's has continued, and is a prime example of the interest men now take in fashion and color. Growth in fashion underwear is expected to continue as more consumers gain awareness and manufacturers and retailers increasingly promote this merchandise in an exciting way.

The term "furnishings" covers a very diversified group of products, ranging from neckwear to underwear. These products are treated in multi-industry data available from government sources in a manner which does not yield composite information. Nor, perhaps, would that be meaningful because of the varying trends within segments of the product group. However, wherever possible in the following tables men's furnishings data has been extracted from broader-based industry reports.

Information on sports shirts is included in this Fact File only where data is combined with dress shirts. (For sport shirt data, see the Men's Sportswear, Casual Wear Fact File). Hosiery information is covered in the Hosiery/Legwear Fact File. Accessory items, such as jewelry and small leather goods, which are often included in retail data covering men's furnishings departments, are not covered in detail in this report but are covered in the Fashion Accessories Fact File.

Industry data as reported by the Department of Commerce and shown in the following tables include manufacturers of furnishings for both men and boys. Separate figures are available, however, on a product basis for the most part, and these are covered for men's items in this report, with boys' items picked up in the Fact File covering boys' and girls' wear.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Census Bureau--the most recent covering the year 1977. In intra-census years the Bureau compiles an annual survey of a sample of manufacturers, and reports from these are adjusted for comparability with findings in the complete census.

For a selected group of major industry classifications, including in the furnishings area Men's & Boys' Shirts & Nightwear (SIC 2321), the U.S. Bureau of Industrial Economics has published estimates on manufacturing activity for 1981 and 1982 (1983 U.S. Industrial Outlook), as noted in the following table. According to this source, value of industry shipments in this industry declined at a compound annual rate of -0.1% in constant 1972 dollar terms, in the period 1972-1982.

GENERAL STATISTICS ON THE INDUSTRY

Shirts & Nightwear (SIC 2321*)

	1982(e)	1981(e)	1980	1979	1977
Number of companies	na	na	na	na	667
Number of establishments, total**	na	na	787	779	928
Number with 20 or more employees	na	na	593	597	679
Employees, total (thous.)	111.2	113.6	115.9	120.7	114.7
Production workers (thous.)	99.7	101.2	103.9	108.4	103.0
Payroll (mil. $)	na	na	$ 931.0	$ 885.5	$ 711.3
Value added by manufacture# (mil. $)	$1,928	$1,896	$1,813.5	$1,633.5	$1,445.7
Value of industry shipments## (mil. $)	$3,914	$4,056	$3,479.5	$3,251.0	$2,934.6
Capital expenditures, new (mil. $)	na	na	$ $42.5	$ 36.2	$ 25.9

Underwear (SIC 2322*)

	1980	1979	1978	1977
Number of companies	na	na	na	56
Number of establishments, total**	71	74	66	76
Number with 20 or more employees	58	60	54	59
Employees, total (thous.)	12.7	13.6	15.4	15.1
Production workers (thous.)	11.8	12.2	14.0	13.7
Payroll (mil. $)	$ 101.8	$ 95.6	$ 104.8	$ 92.2
Value added by manufacture# (mil. $)	$ 210.2	$ 213.7	$ 239.4	$ 218.2
Value of industry shipments## (mil. $)	$ 412.5	$ 426.0	$ 468.3	$ 419.8
Capital expenditures, new (mil. $)	$ 12.2	$ 2.7	$ 2.2	$ 2.6

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Knit Underwear Mills (SIC 2254*)

	1980	1979	1978	1977
Number of companies	na	na	na	80
Number of establishments, total**	84	86	96	92
Number with 20 or more employees	72	75	84	74
Employees, total (thous.)	35.9	28.2	27.5	25.2
Production workers (thous.)	23.6	25.3	24.9	23.4
Payroll (mil. $)	$ 245.0	$ 228.3	$ 209.4	$ 175.2
Value added by manufacture # (mil. $)	$ 392.2	$ 405.0	$ 409.8	$ 305.7
Value of industry shipments## (mil. $)	$ 863.5	$ 802.2	$ 747.6	$ 648.9
Capital expenditures, new (mil. $)	$ 21.4	$ 32.7	$ 21.9	$ 14.5

Neckwear (SIC 2323*)

	1980	1979	1978	1977
Number of companies	na	na	na	199
Number of establishments, total**	164	172	181	207
Number with 20 or more employees	86	80	89	81
Employees, total (thous.)	6.8	7.0	6.8	6.3
Production workers (thous.)	5.5	5.4	5.6	5.1
Payroll (mil. $)	$ 75.0	$ 69.6	$ 62.0	$ 57.5
Value added by manufacture# (mil. $)	$ 153.9	$ 141.5	$ 139.7	$ 117.5
Value of industry shipments## (mil. $)	$ 288.4	$ 266.8	$ 270.5	$ 223.8
Capital expenditures, new (mil. $)	$ 2.8	$ 0.9	$ 1.4	$ 2.6

Hats & Caps (SIC 2352*)

	1980	1979	1978	1977
Number of companies	na	na	na	230
Number of establishments, total**	236	240	223	258
Number with 20 or more employees	132	126	118	122
Employees, total (thous.)	17.2	17.3	14.0	12.4
Production workers (thous.)	15.4	15.3	12.6	11.1
Payroll (mil. $)	$ 141.4	$ 131.2	$ 105.2	$ 85.1
Value added by manufacture# (mil. $)	$ 295.4	$ 240.3	$ 175.4	$ 152.7
Value of industry shipments## (mil. $)	$ 534.2	$ 455.4	$ 336.9	$ 284.8
Capital expenditures, new (mil. $)	$ 21.8	$ 6.9	$ 3.8	$ 3.9

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Hosiery (SIC 2252*)

	1980	1979	1978	1977
Number of companies	na	na	na	382
Number of establishments, total **	368	388	354	415
Number with 20 or more employees	250	251	243	257
Employees, total (thous.)	32.3	31.3	32.9	32.2
Production workers (thous.)	28.1	27.5	29.7	29.0
Payroll (mil. $)	$ 290.4	$ 260.8	$ 245.8	$ 218.7
Value added by manufacture# (mil. $)	$ 495.1	$ 436.4	$ 470.1	$ 401.5
Value of industry shipments## (mil. $)	$1,192.9	$1,061.3	$1,031.2	$ 921.3
Capital expenditures, new (mil. $)	$ 22.1	$ 15.5	$ 15.2	$ 14.8

na = not available
(e) = estimated

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2321 comprises establishments primarily engaged in manufacturing men's, youths' and boys' shirts, collars and nightwear from purchased woven or knit fabric (cut-and-sewed). Also includes manufacturers of knit outerwear sports shirts from purchased knit fabric. Does not include work shirt manufacturers. For 1977 the 928 establishments (plants) in this industry included 469 manufacturers, 108 jobbers, 192 independent contractors and 159 multiplant company contractors.

SIC 2322 includes establishments primarily engaged in manufacturing men's, youths' boys' underwear cut and sewed from purchased woven or knit fabric.

SIC 2254 includes establishments primarily engaged in knitting underwear and nightwear from yarn, or in making them from knit fabric produced in the same mill.

SIC 2323 comprises establishments primarily engaged in manufacturing men's, youths' and boys' neckties, scarfs and mufflers cut and sewed from purchased woven or knit fabric.

SIC 2352 includes establishments primarily engaged in manufacturing hats, caps and hat bodies. Millinery is not included.

SIC 2252 includes mills primarily making men's and boys' hosiery. It includes mills engaged in knitting, dyeing or finishing hosiery except women's hosiery. In addition to men's and boys' hosiery, the industry makes anklets for women and children, slipper socks, etc.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

(footnotes continued)

**Each business location is counted as a separate establishment. (For 1979 and 1980 figures are from County Business Patterns (U.S. Bureau of the Census).

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for more purposes the best value of measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone (men's furnishings) of these industries, plus the value of these products produced by manufacturers classified in other industries, are shown on pages 17 and 18.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Annual Surveys of Manufactures, 1979, 1980,
U.S. Bureau of Industrial Economics
1983 U.S. Industrial Outlook.

Employment & Earnings

As of October 1982 employment levels in plants producing major categories of furnishings which are reported in monthly Bureau of Labor Statistics' reports were below the level in the same month of 1981. Production worker employment was down somewhat greater, percentage wise, than overall employment. Hourly earnings, however, were generally higher in October 1982.

Men's and boys' hosiery mills generally were faring better both in 1981 and 1982 than the shirt, nightwear and knit underwear mills. The U.S. Bureau of Industrial Economics reported that in the period 1972-1982 production workers employment in the Men's & Boys' Shirt & Nightwear industry declined at a compound annual rate of -0.2%.

Employment & Earnings Among Furnishings Manufacturers
(Includes Producers of Both Men's & Boys')

	Monthly Averages			Annual Averages		
Industry	Oct. 1982(p)	Oct. 1981	% Change, Oct. 1982/1981	1981	1980	% Change 1981/1980
Shirts & nightwear (SIC 2321*)						
All employees (thous.)	90.5	99.4	- 9.0%	97.4	99.2	- 1.8%
Production workers (thous.)	77.1	85.7	- 10.0	83.7	85.8	- 2.4
Avg. weekly earnings	$162.62	$163.99	- 0.8	160.92	$149.14	+ 7.9
Avg. hourly earnings	$ 4.62	$ 4.53	+ 2.0	4.47	$ 4.12	+ 8.5
Avg. weekly hours	35.2	36.2	- 2.8	36.0	36.2	- 0.5
Avg. overtime hours	1.1	0.9	+ 22.2	0.9	1.1	- 18.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment & Earnings Among Furnishings Manufacturers
(Includes Producers of Both Men's & Boys')
(continued)

	Monthly Averages			Annual Averages		
	Oct. 1982(p)	Oct. 1981	% Change, Oct. 1982/1981	1981	1980	% Change 1981/1980
Hosiery, (SIC 2252*)						
All employees (thous.)	31.1	33.2	- 6.3%	32.9	32.9	--
Production workers (thous.)	28.2	30.2	- 6.6	29.9	23.5	+ 27.2%
Avg. weekly earnings	$200.79	$186.24	+ 7.8	$181.98	$166.21	+ 9.5
Avg. hourly earnings	$ 5.27	$ 4.94	+ 6.7	$ 4.84	$ 4.48	+ 8.0
Avg. weekly hours	38.1	37.7	+ 1.1	37.6	37.6	--
Avg. overtime hours	2.3	2.0	+ 15.0	2.0	1.8	+ 11.1
Knit underwear mills (SIC 2254*)						
All employees (thous.)	27.9	29.6	- 5.7%	30.2	30.9	- 2.3%
Production workers (thous.)	23.4	25.6	- 8.6	26.1	26.7	- 2.2
Avg. weekly earnings	$187.76	$181.22	+ 3.6	$177.48	$168.18	+ 5.5
Avg. hourly earnings	$ 5.23	$ 5.02	+ 4.1	$ 4.93	$ 4.57	+ 7.9
Avg. weekly hours	35.9	36.1	- 0.6	36.0	36.8	- 2.2
Avg. overtime hours	1.3	1.2	+ 8.3	1.1	1.5	- 26.7

(p) = preliminary
* For definitions of these SIC codes, see page 4.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

Concentration in the Industry

Plants in industries producing furnishings are for the most part small operations with fewer than 50 employees. However, although figures for larger operations are generally withheld by the BLS to avoid disclosure of individual companies, plants with over 100 employees, while representing a relatively small share of the total, account for a major percentage of employment and of total shipments.

In neckwear, for example, 6.7% of the plants (11 in number) accounted for about 37% of total employment. In the knit underwear industry, 25 mills (about 30% of the total) accounted for over 80% of total employment in 1980.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Furnishings Manufacturing Establishments by Employment Class Size, 1980

	Establishments		Employees	
Industry	Number	% of Total	No. (Thous.)	% of Total
Shirts & nightwear (SIC 2321*), total	787	100.0%	878.7	100.0%
By establishment size:				
Under 10 employees	108	13.7	(D)	--
10-19 employees	86	10.9	17.2	2.2
20-49 employees	130	16.5	41.9	5.3
50-99 employees	105	13.3	66.8	8.5
100-249 employees	225	28.6	285.9	36.3
250 or more employees	133	16.9	(D)	--
Underwear, cut-&-sewn (SIC 2322*), total	71	100.0%	119.2	100.0%
By establishment size:				
Under 10 employees	9	12.7	(D)	--
10-19 employees	4	5.6	0.6	0.5
20-49 employees	13	18.3	2.7	2.3
50-99 employees	9	12.7	5.7	4.8
100-249 employees	14	19.7	17.1	14.3
250 or more employees	22	31.0	(D)	--
Knit underwear mills (SIC 2254*), total	84	100.0%	24.9	100.0%
By establishment size:				
Under 10 employees	7	8.3	**	--
10-19 employees	5	5.9	0.1	0.4
20-49 employees	10	11.9	0.4	1.6
50-99 employees	17	20.2	1.3	5.2
100-249 employees	20	23.8	3.1	12.4
250 or more employees	25	29.8	20.0	80.3
Neckwear (SIC 2323*), total	164	100.0%	72.3	100.0%
By establishment size:				
Under 10 employees	48	29.3	1.9	2.6
10-19 employees	30	18.3	4.1	5.7
20-49 employees	49	29.9	17.9	24.8
50-99 employees	26	15.9	21.8	30.2
100-249 employees	8	4.9	12.1	16.7
250 or more employees	3	1.8	14.5	20.1
Hats & caps (SIC 2352*), total	236	100.0%	134.3	100.0%
By establishment size:				
Under 10 employees	60	25.4	(D)	--
10-19 employees	44	18.6	5.0	3.7
20-49 employees	53	22.5	16.2	12.0
50-99 employees	38	16.1	22.4	16.6
100-249 employees	32	13.6	45.9	34.1
250 or more employees	9	3.8	(D)	--

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Furnishings Manufacturing Establishments By Employment Class Size, 1980
(continued)

	Establishments		Employees	
	Number	% of Total	No. (Thous.)	% of Total
Hosiery (SIC 2252*), total	368	100.0%	37.8	100.0%
By employment size:				
Under 10 employees	65	17.7	(D)	--
10-19 employees	53	14.4	0.8	2.1
20-49 employees	91	24.8	3.0	7.9
50-99 employees	54	14.7	4.1	10.8
100-249 employees	71	19.3	11.2	29.6
250 or more employees	34	9.2	(D)	--

* For a definition of these SIC codes see page 4.
**Total is less than 0.1.
(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
County Business Patterns, 1980 (CBP-80-1).

Employment & Share of Industry Shipments in Large Furnishings Manufacturing Plants, 1981

	Number of Plants		% of Industry Shipments Accounted for by Plants With 100 or more Employees
	With 20+ Employees	With 100+ Employees	
Shirts & nightwear (SIC 2321*)	576	407	93%
Underwear, cut-&-sewn (SIC 2322*)	73	59	97
Knit underwear mills (SIC 2254*)	83	56	94
Neckwear (SIC 2323*)	105	19	51
Hats & caps (2352*)	161	51	66
Hosiery (SIC 2252*)	262	104	79

* For a definition of these SIC codes, see page 4.

Source: Sales and Marketing Management,
"Survey of Industrial Purchasing Power",
April 1982, All rights reserved.

Industry concentration in terms of share of shipments by company size has been reported by the Census Bureau for the year 1977. The share of industry shipments accounted for by the 50 largest companies in each of the covered furnishings manufacturing industries ranged from 100% in men's and boys' underwear (cut-&-sewn) to about 65% in shirts and nightwear.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The four largest companies held a 42% share of 1977 industry shipments in the knit underwear industry and in cut-&-sewn underwear, about 61%.

Concentration Ratios Among Companies Manufacturing Furnishings, 1977

Industry	Value of Shipments (Mil. $)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Shirts & nightwear (SIC 2321*)	$2,934.6	17.3%	27.5%	47.7%	64.8%
Underwear, cut-&-sewn (SIC 2322*)	419.8	61.4	81.8	95.0	100.0
Knit underwear mills (SIC 2254*)	648.9	42.1	58.5	84.5	98.6
Neckwear (SIC 2323*)	223.8	27.2	39.3	58.4	84.0
Hats & caps (SIC 2352*)	284.8	27.1	42.9	62.6	82.9
Hosiery (SIC 2252*)	921.3	19.1	29.8	46.4	66.4

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Concentration Ratios in Manufacturing,
MC77-SR-9.

Manufacturers' Operating Ratios

Selected Operating Ratios for Furnishings Manufacturers, 1980
(Median Results)

Industry	No. of Companies Reporting	Current Assets to Current Debt (times)	Net Profits on Net Sales (percent)	Profits on Net Worth (percent)	Sales to Net Worth (times)
Shirts & nightwear (SIC 2321*)	156	1.88	2.40	15.95	6.72
Underwear, cut-&-sewn (SIC 2322*)	14	2.05	0.52	4.85	3.75
Knit underwear mills (SIC 2254*)	18	2.57	6.79	26.08	3.44
Neckwear (SIC 2323*)	37	2.51	2.59	15.11	4.83
Hats & Caps (SIC 2352*)	36	1.77	2.05	19.15	5.83
Hosiery (SIC 2252*)	63	2.61	1.90	20.57	5.22

* For a definition of these SIC codes, see page 4.

Source: Dun & Bradstreet
Key Business Ratios, 1980
All rights reserved.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York accounted for the major share of plants in four of the six categories of men's furnishings reported on in the 1977 Census of Manufactures. North Carolina had the greatest number of plants in the hosiery segment, while Pennsylvania ranked first in the number of knit underwear mills.

More than two out of every three plants producing hosiery in the U.S. in 1977 were located in North Carolina while almost half of all neckwear plants were located in New York during that same year.

Leading Manufacturing States in Furnishings, 1977

	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
Industry	Total	With 20+ Employees		
Shirts & nightwear (SIC 2321*)				
Leading states:				
New York	156	69	$ 161.8	$ 463.2
California	130	76	98.8	241.1
North Carolina	85	71	122.9	251.5
Pennsylvania	76	67	126.2	245.8
Alabama	62	60	166.2	320.6
Tennessee	59	54	143.3	290.1
Georgia	42	40	109.3	212.5
U.S. total	928	679	1,445.7	2,934.6
Leading states, total	610	437	928.5	2,024.8
Percent of U.S. total	66%	64%	64%	69%
Underwear, cut-&-sewn (SIC 2322*)				
Leading states				
New York	12	4	$ 3.9	$ 9.8
Pennsylvania	10	7	6.0	16.6
North Carolina	8	6	(D)	(D)
Kentucky	7	7	(D)	(D)
South Carolina	6	6	14.3	31.9
U.S. total	76	59	218.2	419.8
Leading states, total	43	30	na	na
Percent of U.S. total	57%	51%	na	na
Knit underwear mills (SIC 2254*)				
Leading states				
Pennsylvania	34	29	$ 63.6	$ 147.5
New York	14	9	15.4	29.8
North Carolina	14	10	49.6	100.8
Tennessee	5	5	(D)	(D)
Mississippi	4	4	19.5	34.7
U.S. total	92	74	305.7	648.9
Leading states, total	71	57	na	na
Percent of U.S. total	77%	77%	na	na

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading Manufacturing States in Furnishings, 1977
(continued)

Industry	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Neckwear (SIC 2323*)				
Leading states:				
New York	87	35	$ 45.8	$ 87.9
California	20	9	(D)	(D)
New Jersey	13	4	3.5	7.0
Massachusetts	10	4	2.8	5.7
Connecticut	9	6	6.1	10.5
U.S. total	207	81	117.5	223.8
Leading states, total	139	58	na	na
Percent of U.S. total	67%	72%	na	na
Hats & caps (SIC 2352*)				
Leading states:				
New York	86	28	$ 22.2	$ 42.6
Missouri	34	28	(D)	(D)
Pennsylvania	20	11	(D)	(D)
California	17	5	5.7	10.1
Texas	15	7	(D)	(D)
Illinois	12	6	(D)	(D)
New Jersey	12	6	(D)	(D)
Massachusetts	11	4	3.9	9.1
U.S. total	258	122	152.7	248.8
Leading states total	207	95	na	na
Percent of U.S. total	80%	78%	na	na
Hosiery (SIC 2252*)				
Leading states:				
North Carolina	281	168	$ 252.7	$ 589.9
Tennessee	35	29	50.6	111.7
Alabama	28	15	13.7	32.2
Georgia	22	15	22.9	52.1
U.S. total	415	257	401.5	921.3
Leading states, total	366	227	339.9	785.9
Percent of U.S. total	88%	88%	85%	85%

* For a definition of these SIC codes, see page 4.

(D) = Data withheld by the Census Bureau to avoid disclosing figures for individual firms.

na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series

PRODUCTION

The overall view of production levels in men's furnishings available from the Federal Reserve Board industrial production indexes was not published by the Board for 1982. However, the trend since 1979 has been downward, with the index for 1981 falling 16.4% from the 1980 level. This compares with an overall decline of 5.2% in overall production of apparel in the same period.

Industrial Production Indexes, 1977-1981
(1967=100)

	1981	1980	1979	1978	1977
Apparel products, total	120.4	127.0	134.4	134.2	124.2
Men's furnishings	119.9	143.4	151.0	135.2	122.5

Source: Board of Governors,
Federal Reserve System, (G.12.3).

Annual data on production of major types of men's wear, based on a survey of all known manufacturers and jobbers (except very small firms) is reported in the Current Industrial Reports issued by the U.S. Bureau of the Census. In 1981 a number of manufacturers not previously included in the annual surveys were added and this has affected comparability of 1981 and 1980 data to varying degrees.

In the following summary, adjustments have been made to show comparable percentage changes based on the share of 1981 production and shipments accounted for by the newly-added manufacturers. In the next table, figures for 1980 production are reported where the affect of the newly-added companies on comparability is minimal.

Summary of Production of Reported Furnishings, 1981/1980
(Men's only, except where noted)

	Thous. Units 1981	% Change 1981/1980
Dress & business shirts, incl. uniforms	98,824	- 5.3%
Pajamas & other nightwear	13,476	- 10.9
Robes (men's & boys')	8,712	- 0.6
Lightweight undershirts with ¼ sleeve, excl. T-shirts made for outerwear	191,688	- 0.7
Sleeveless type athletic undershirts (men's & boys')	38,268	- 11.6
Thermal underwear tops (men's & boys')	19,022	- 15.8
Thermal underwear bottoms (men's & boys')	19,812	- 17.3
Thermal one-piece underwear (men's & boys')	11,752	+ 8.1
Boxer shorts	59,340	na
Other shorts (underwear type)	5,820	- 21.9
Supporter-type knit briefs	242,196	+ 3.6
Hosiery, size ten & up	68,401	+ 8.5

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23-E(81)-1,
Underwear & Nightwear, MA23G(81)-1.

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1980, 1981

	Thous. units		1981 % of Total
	1981	1980(r)	
Men's dress & business shirts, incl. uniform, total	94,824	*	100.0%
By fabric:			
All cotton & chiefly cotton	14,772		15.6
All man-made & chiefly man-made	67,448		71.1
All other fabric	192		0.2
Fabric, n.s.k.	12,372		13.0
By construction:			
Woven fabric	74,580		78.7
Knit fabric	8,244		8.7
Construction, n.s.k.	12,000		12.7
Uniform shirts	6,804		7.2
Men's pajamas & other nightwear, excl. robes, total	13,476	15,048	100.0
By construction:			
Woven fabric	11,556	12,852	85.8
Knit fabric	1,920	2,196	14.2
By fabric:			
All cotton & chiefly cotton	10,188	11,736	75.6
All man-made & chiefly man-made	3,288	3,312	24.4
All other fabric			
Men's & boys' robes, total	8,712	8,724	100.0
By construction:			
Woven fabric	3,744	3,312	43.0
Knit fabric	4,968	5,412	57.0
By fabric:			
All cotton & chiefly cotton	2,400	2,508	27.5
All man-made & chiefly man-made	6,312	6,216	72.5
All other fabric			
Knit underwear			
Men's lightwear undershirts with ¼ sleeve, excl. T-shirts made for outerwear, total	191,688	192,108	100.0
By fabric:			
Cotton/polyester blended fabric	69,756	72,216	36.4
All cotton & all other cotton blends	115,572	119,892	60.3
All other fabric	360	--	0.2
Fabric, n.s.k.	6,000	--	3.1
Men's & boys' sleeveless athletic type undershirts, total	38,268	43,092	100.0
By fabric:			
Cotton/polyester blended fabric	9,396	9,912	24.6
All cotton & all other cotton blends	25,584	29,796	66.9
All other fabric	2,784	3,384	7.2
Fabric, n.s.k.			

(continued)

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1980, 1981

(continued)

	Thous. units		1981 % of
	1981	1980(r)	Total
Knit underwear (continued)			
Men's & boys' thermal underwear, incl. winter weight, total	40,586	47,184	--
Tops, total	19,022	22,056	100.0%
By fabric:			
Cotton/polyester blend	11,784	13,344	61.9
All cotton & other cotton blends	5,496	6,432	28.9
All other fabric	660	720	3.5
Fabric, n.s.k.	1,080	1,560	5.7
Bottoms, total	19,812	23,508	100.0
By fabric:			
Cotton/polyester blend	11,544	14,016	58.3
All cotton & other cotton blends	5,208	6,132	26.3
All other fabric	492	768	2.5
Fabric, n.s.k.	2,568	2,592	13.0
One-piece (union-suits), total	1,752	1,620	100.0
By fabric:			
Cotton/polyester blend	768	708	43.8
All cotton & all other cotton blends All other fabric	984	912	56.2
Shorts & briefs, knit			
Men's supporter-type, total	249,756	232,500	100.0
Cotton/polyester blend	88,284	77,436	35.3
All-cotton & all other cotton blends	159,192	151,848	63.7
All other fabric	2,280	3,216	1.0
Boxer shorts, men's, woven	59,304	60,240	100.0
Cotton/polyester blend	50,052	40,056	84.4
All-cotton & all other cotton blends All other fabric	9,252	20,184	15.6

(r) revised from figures originally reported for 1980 but not adjusted for comparability with 1981.

n.s.k. - not specified by kind

*Manufacturers added to the 1981 reports accounted for over 10% of total production of men's shirts in that year, but did not report figures for 1980. Comparable figures are therefore not available.

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA-23E & MA23G(81)-1
(Issued January 1983).

Production of Reported Types of Men's Hosiery by Type Of Fabric & Construction, 1980, 1981

	(Thous. Units) 1981	1980	% Change 1981/1980	1981 % of Total
Men's hosiery, size 10 & up, total (thous. pairs)	68,401	63,063	+ 8.5%	100.0%
Footsocks	517	292	+ 77.0	0.8
Anklets	27,285	27,624	- 1.2	39.9
Mid-calf/crew	19,945	17,375	+ 14.8	29.2
Knee-highs	20,654	17,772	+ 16.2	30.2

Source: National Association of Hosiery Manufacturers, 1981 Hosiery Statistics.

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977

	Delivered Cost (million $)
Shirts & nightwear (SIC 2321*), total	$ 1,107.9
Broad woven fabrics	400.7
Purchased knitted fabrics	365.8
All other materials, containers & supplies	341.4
Underwear (cut-&-sewn) (SIC 2322*), total	182.3
Broad woven fabrics	30.3
Purchased knitted fabrics	112.4
All other materials, containers & supplies	39.6
Knit underwear mills (SIC 2254*), total	325.8
Purchased knitted fabrics	7.5
Carded cotton yarns	94.5
Combed cotton yarns	40.7
Man-made fiber yarns, filament & spun	34.4
All other yarns	25.7
All other materials, containers & supplies	123.0
Neckwear (SIC 2323*), total	93.4
Broad woven fabrics	49.5
Purchased knitted fabrics	1.8
All other materials, containers & supplies	42.1

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Men's Furnishings, 1977
(continued)

	Delivered Cost (million $)
Hosiery (SIC 2252*), total	$ 478.1
Hosiery in the griege	134.8
Cotton yarns	53.1
Nylon spun yarns	28.7
Acrylic yarns	71.7
Nylon filament yarns	42.6
Spandex filament yarns	4.8
All other yarns	29.7
All other materials, containers & supplies	112.7

*For a definition of these SIC codes, see page 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Industry Series.

Seasonality in Production

Percent of Men's Dress & Business Shirt Cuttings by Month, 1980, 1981

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1981	100.0%	6.6%	7.8%	9.1%	8.8%	8.8%	6.3%	8.3%	8.1%	9.4%	8.4%	8.9%	9.5%
1980	100.0	10.0	8.8	9.1	8.6	8.3	9.5	6.3	8.4	8.4	9.9	7.1	5.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1

SHIPMENTS

The value of shipments in the following tables covers the total value reported for all manufacturers of the specified product, regardless of the manufacturers' industry classification. This product basis differs from the "industry shipment" data as described in the Industry Section of this report.

The largest single segment of furnishings covered in government data is shirts and nightwear. However, as previously noted, this data includes sport shirts, usually classified in the trade (and in Fact File reports) with sportswear. According to the U.S. Bureau of Industrial Economics, shipments of all types of shirts (except work) and nightwear for men and boys in 1982 gained about 5% in value in 1982 over 1981. In the period 1972-1982, however, on a constant dollar basis, shipments declined in value at a compound annual rate of -0.3%.

SHIPMENTS

Information from the latest report on the Annual Survey of Manufactures covering product shipments for 1980, compared with 1979, are shown below.

Value of Shipments by All U.S. Producers
Of Specified Categories of Men's & Boys' Furnishings, 1979, 1980

	Millions of $		% Change
	1980	1979	1980/1979
Men's & boys' shirts (incl. sport shirts) & nightwear	$3,340.1	$3,007.5	+ 11.1%
Men's & boys' knit outerwear sport shirts	1,264.4	1,007.9	+ 25.4
Men's & boys' dress & sport shirts	1,323.8	1,306.5	+ 1.3
Men's & boys' nightwear	167.6	165.5	+ 1.3
Contract work on men's & boys' shirts & nightwear	546.6	527.6	+ 3.6
Shirts & nightwear, n.s.k.	37.7	--	na
Men's & boys' underwear (made from purchased materials)	397.7	386.2	+ 3.0
Men's, youths' & boys' neckwear	280.0	252.5	+ 10.9
Hats & caps, except millinery	543.3	382.1	+ 42.2
Hats & hat bodies, exc. cloth & millinery	205.9	130.0	+ 58.4
Cloth hats & caps	300.4	217.0	+ 38.4
Hats & caps, exc. millinery, n.s.k.	37.0	35.1	+ 5.4
Hosiery	1,189.5	1,045.4	+ 13.7
Men's finished seamless hosiery	681.9	627.6	+ 8.6
All other finished seamless hosiery	355.2	318.3	+ 11.6
Seamless gray hosiery, exc. women's full & knee-high	113.7	70.2	+ 62.0
Hosiery, n.e.c., n.s.k.	38.7	29.4	+ 31.6
Knit underwear & nightwear	731.1	703.7	+ 3.9
Men's & boys' knit underwear & nightwear	538.4	526.7	+ 2.2
Knit underwear & nightwear, n.s.k.	na	12.2	na

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified
na = not available

Source: U.S. Bureau of the Census,
1980 Annual Survey of Manufactures,
Value of Product Shipments M80 (AS)-2.

SHIPMENTS

Information more specifically covering men's furnishings is available through the U.S. Census Bureau's Current Industrial Report series (also covered in the section on Production). This information is based on a survey of manufacturers and jobbers (except small firms).

In 1981 the U.S. Census Bureau added a number of manufacturers in their survey coverage which had not been included in previous data, and this has affected comparability of information on both production and shipments of specific products for 1981 and 1980 to varying degrees. In the furnishings area, this effect is most pronounced in dress and business shirts, but was minimal in other types and comparisons are, therefore, shown for the two years.

Value of Shipments of Specified Types of Furnishings, 1980, 1981
(Men's only, except where noted)

	Millions of $		% Change
	1981	1980	1981/1980
Dress & business shirts, incl. uniform	$ 731.4	$ 672.0	n.c.
Pajamas & other nightwear	78.8	81.4	- 3.2%
Robes (men's & boys')	81.3	74.6	+ 9.0
Boxer shorts, woven	80.2	78.9	+ 1.6
Boxer shorts, knit, supporter type (men's & boys')	6.6	8.7	- 24.1
Supporter-type knit briefs	276.8	245.2	+ 12.9
Lightweights undershirts with ¼ sleeve, excl. outerwear T-shirts	278.9	236.8	+ 17.8
Sleeveless athletic-type undershirts (men's & boys')	40.7	42.9	- 5.1
Thermal underwear (men's & boys')	123.4	124.1	- 0.6
Tops (undershirts)	57.7	56.1	+ 2.8
Bottoms (drawers, etc.)	55.5	58.8	- 5.6
One piece (union suits)	10.2	9.2	+ 10.9

n.c.= not comparable.

Source: U.S. Bureau of the Census, Current Industrial Reports, MA23E and MA23G (81)-1 (issued January 1983).

Shipments by Leading States

No one state dominates as the origin of shipments of reported categories of men's furnishings shipments according to data supplied by the U.S. Bureau of the Census in the 1977 Census of Manufactures. New York is the only state to lead in more than one category by being the primary state for shipments of men's dress & sport shirts as well as nightwear.

SHIPMENTS

Shipments by Leading States

Value of Shipments of Specified Furnishings By All Producers by Leading States, 1977

	Mil. $	% of Total
Dress & sport shirts		
Leading states:		
New York	$ 218.9	16.3%
Tennessee	158.3	11.8
California	140.0	10.4
Georgia	137.7	10.2
Alabama	119.1	8.9
Pennsylvania	81.6	6.1
Leading states, total	855.6	63.6
U.S. total	1,344.6	100.0
Nightwear		
Leading states:		
New York	65.2	42.7
Pennsylvania	18.9	12.4
South Carolina	14.7	9.6
Leading states, total	98.8	64.7
U.S. total	152.8	100.0
Knit & woven underwear		
Leading states:		
Georgia	29.4	8.6
South Carolina	26.8	7.9
New York	18.6	5.4
Alabama	14.4	4.2
Pennsylvania	13.5	4.0
Leading states, total	102.7	30.1
U.S. total	341.4	100.0
Knit underwear & nightwear		
Leading states:		
Pennsylvania	95.8	22.2
North Carolina	72.9	16.9
Mississippi	24.6	5.7
New York	14.8	3.4
Leading states, total	208.1	48.3
U.S. total	431.0	100.0

(continued)

SHIPMENTS

Shipments by Leading States

Value of Shipments of Specified Furnishings By All Producers by Leading States, 1977 (continued)

	Mil. $	% of Total
Men's finished seamless hosiery		
Leading states:		
North Carolina	$ 169.9	36.6
Tennessee	40.6	8.7
Pennsylvania	29.1	6.3
Alabama	18.2	3.9
Georgia	17.4	3.7
Leading states, total	275.2	59.2
U.S. total	464.6	100.0
Hats & hat bodies, exc. cloth & millinery		
Leading states:		
Texas	25.6	38.6
Pennsylvania	13.4	20.2
New York	4.2	6.3
Leading states, total	43.2	65.1
U.S. total	66.4	100.0
Cloth hats & caps		
Leading states:		
Missouri	48.9	27.7
New York	22.8	12.9
Pennsylvania	20.2	11.4
Virginia	11.3	6.4
Texas	9.1	5.1
Leading states, total	112.3	63.6
U.S. total	176.6	100.0

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

PRODUCER PRICES

The largest jump in prices, as measured by the U.S. Bureau of Labor Statistics Producer (Factory) Price Indexes, in furnishings between 1981 and 1982 was for knit undershirts, up 11.3% in the one year period. Prices for men's & boys' knit shorts and briefs rose 11.2% between 1981 and 1982, while the smallest increase of any category was in hats and caps where factory prices went up a meager 0.5%.

PRODUCER PRICES

Producer Price Indexes for Specified Furnishings, 1980-1982
(1977 = 100, unless otherwise indicated)

	Annual Averages			% Change	
	1982(p)	1981	1980	1982/1981	1982/1980
All items*	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Men's & boys' wear, all types*	219.5	210.9	200.4	+ 4.1	+ 9.5
Men's dress & business shirts	133.1	126.8	120.3	+ 5.0	+ 10.6
Men's socks	141.4	135.3	122.3	+ 4.5	+ 15.6
Men's & boys' knit undershirts*	256.8	230.8	204.3	+ 11.3	+ 25.7
Men's & boys' knit shorts & briefs	137.5	123.7	114.3	+ 11.2	+ 20.3
Men's & boys' nightwear*	228.2	226.3	214.9	+ 0.8	+ 6.2
Men's & boys' ties	125.3	120.5	118.4	+ 4.0	+ 5.8
Hats & caps	132.8	132.2	118.2	+ 0.5	+ 12.4

* = 1967 = 100
(p) - preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports play a significant role in many types of furnishings and have accounted for much of the growth in the U.S. market. According to the U.S. Bureau of Industrial Economics, imports accounted for about 38% of total apparent consumption in the U.S. of men's and boys' shirts and underwear. Imports represented almost 25% of new supply (product shipments plus imports) while exports represented only 2.2% of U.S. shipments in 1982.

Detailed figures on imports and exports from the Census Bureau are covered in the following tables. In the first nine months of 1982 compared with the same period of 1981 imports of reported categories were well ahead. Imports of nightwear/underwear (not knit), up 43% in value; shirts (not knit), up over 27%; knit underwear, up 18%; knit shirts, up 10%.

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981

	Quantity (Thous. Doz.)		% Change	Value C.I.F. * (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Furnishings, reported categories, total	5,072.5	4,433.3	+ 14.4%	$185.4	$149.4	+ 24.1%
Dress shirts, cotton, not knit, total	929.7	742.1	+ 25.3	60.2	46.7	+ 28.9
Hong Kong	535.0	470.5	+ 13.7	35.6	29.5	+ 20.7
Singapore	115.3	56.8	+103.0	6.3	2.9	+117.2
India	103.9	51.7	+101.0	5.0	2.6	+ 92.3

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
T-shirts, cotton, not knit total	775.5	636.8	+ 21.8%	$ 13.7	$ 10.8	+ 26.9%
Pakistan	327.1	224.0	+ 46.0	2.5	1.6	+ 56.3
Mainland China	135.8	87.8	+ 54.7	1.9	1.1	+ 72.7
Mexico	81.5	67.0	+ 21.6	3.3	2.9	+ 13.8
Dressing gowns & robes, not knit, cotton, total	46.0	53.7	- 14.3	3.9	4.8	- 18.8
Taiwan	13.4	8.0	+ 67.5	0.5	0.3	+ 66.7
Brazil	8.7	9.3	- 6.5	1.7	1.8	- 5.6
Hong Kong	8.5	8.5	--	0.5	0.4	+ 25.0
Dressing gowns & robes, not knit, wool, total	0.6	0.7	- 14.3	0.2	0.1	+100.0
Korea	0.5	na	na	0.1	na	na
Dressing gowns & robes, not knit, man-made, total	14.0	33.4	- 58.1	0.6	0.6	--
Mainland China	6.0	3.3	+ 81.8	0.3	0.2	+ 50.0
Taiwan	3.8	2.0	+ 90.0	0.2	0.1	+100.0
Underwear, not knit, total	na	na	--	4.2	2.6	+ 61.5
Honduras	na	na	--	3.8	1.7	+123.5
Nicaragua	na	na	--	1.3	0.6	+116.7
Underwear, knit, total	395.6	870.6	+ 2.9	8.0	7.7	+ 3.9
Hong Kong	475.4	359.2	+ 32.3	2.5	1.8	+ 38.9
Taiwan	142.4	76.2	+ 86.6	1.2	0.6	+100.0
Mexico	132.0	310.1	- 57.4	1.2	2.6	- 53.8
Pajamas, not knit, cotton total	848.5	846.7	+ 0.2	36.2	34.0	+ 6.5
Dominican Republic	242.9	257.3	- 5.6	9.3	9.7	- 4.1
Hong Kong	239.2	249.2	- 4.0	10.4	10.1	+ 3.0
Taiwan	133.7	93.9	+ 42.4	5.7	3.7	+ 54.1
Pajamas, not knit, man-made total	90.2	115.7	- 22.0	3.7	4.5	- 17.8
Dominican Republic	46.8	65.9	- 29.0	1.7	2.3	- 26.1
Korea	21.1	36.9	- 42.8	1.0	1.7	- 41.2
Taiwan	19.8	10.4	+ 90.4	0.9	0.4	+125.0

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Specified Furnishings By Leading Countries of Origin, 1980, 1981
(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. Dollars)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Neckties, not knit, total	390.1	281.9	+ 38.4%	$ 19.0	$ 15.2	+ 25.0%
Italy	209.1	162.0	+ 29.1	11.3	9.0	+ 25.6
Dominican Republic	53.8	10.8	+398.1	0.8	0.2	+300.0
United Kingdom	45.9	39.5	+ 16.2	1.7	1.8	- 5.6
Headwear, fur not on the skin, total	69.7	29.8	+133.9	12.6	5.4	+133.3
Brazil	13.8	2.1	+557.1	2.8	0.3	+833.3
Federal Republic of Germany	13.7	4.5	+204.4	2.0	0.8	+150.0
Portugal	8.4	1.2	+600.0	0.9	0.1	+800.0
Work shirts, not knit, cotton, total	237.1	185.1	+ 28.0	9.4	6.2	+ 51.6
Hong Kong	104.5	65.3	+ 60.0	4.1	2.3	+ 78.3
Taiwan	40.6	39.4	+ 3.0	1.5	1.3	+ 15.4
Mainland China	20.8	8.5	+144.8	0.8	1.0	- 20.0
T-shirts, knit, cotton total	775.5	636.8	+ 21.8	13.7	10.8	+ 26.9
Pakistan	327.1	224.0	+ 46.0	2.5	1.6	+ 56.3
Mainland China	135.8	87.8	+ 54.7	1.9	1.1	+ 72.7
Mexico	81.5	67.0	+ 21.6	3.3	2.9	+ 13.8

* = The CIF value represents the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT135,
Dec. 1980, 1981.

Exports

U.S. exports of men's & boys' furnishings were down 8.0% in dollar value despite a slight gain on a unit basis. Exports totaled $92.2 million in 1981 compared with $100.3 in the previous year. On a unit basis, exports of furnishings were 6.9 million dozen, in 1981 and 6.8 million in 1980.

FOREIGN TRADE

Exports

Underwear, the largest furnishing export, registered a 0.5% gain in value in 1981, reaching $18.9 million, compared with $18.8 million in 1979. On a unit measure, exports of underwear fell during the period to 1.5 million dozen a 10.9% decline from 1979's value of 1.7 million dozen.

Quantity & Value of Exports of Specified Furnishings, 1980, 1981

	Quantity (Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Furnishings, reported categories total	6,889,394	6,843,927	+ 0.6%	$92,231	$100,288	- 8.0%
Dress shirts, not knit	222,532	321,187	- 30.7	7,961	9,494	- 16.1
Cotton	96,994	172,795	- 43.9	3,787	4,645	- 18.5
Man-made	125,538	148,392	- 15.4	4,174	4,849	- 13.9
Work shirts, not knit	91,632	112,702	- 18.7	2,671	2,605	+ 2.5
Cotton	30,030	63,845	- 53.0	1,380	1,556	- 11.3
Man-made	61,602	48,857	+ 26.1	1,291	1,049	+ 23.1
Dress & work shirts, knit	341,655	319,571	+ 6.9	9,378	8,963	+ 4.6
Cotton	224,353	206,912	+ 8.4	7,026	6,739	+ 4.3
Man-made	117,302	112,659	+ 4.1	2,352	2,224	+ 5.8
Robes & dressing gowns, not knit	1,115,954	1,102,048	+ 1.3	4,085	5,068	- 19.4
Cotton	1,099,698	1,094,549	+ 0.5	3,583	4,747	- 24.5
Wool	437	2,081	- 79.0	45	104	- 56.7
Man-made	15,819	5,418	+192.0	457	217	+110.6
Pajamas & other nightwear, total	358,527	438,965	- 18.3	10,523	12,859	- 18.2
Not knit	20,622	104,163	- 80.2	736	3,072	- 76.0
Cotton	8,557	82,076	- 89.6	290	2,357	- 87.7
Wool	1,593	748	+113.0	57	36	+ 58.3
Man-made	6,715	19,114	- 64.9	273	563	- 51.5
Other textile material	3,757	2,225	+ 68.9	116	116	--
Knit	337,905	334,802	+ 0.9	9,787	9,787	--
Cotton	328,072	317,364	+ 3.4	9,292	9,092	+ 2.2
Man-made	3,814	5,471	- 30.3	240	351	- 31.6
Wool	1,382	9,844	- 86.0	82	281	- 70.8
Other textile material	4,637	2,123	+118.4	173	63	+174.6
Underwear, total	1,522,899	1,708,263	- 10.9	18,939	18,845	+ 0.5
Underwear, briefs, drawers, undershorts	909,398	1,151,235	- 21.0	11,401	12,002	- 5.0
Not knit	488,154	598,634	- 18.5	4,913	4,396	+ 11.8
Cotton	444,952	273,711	+ 62.6	4,574	3,193	+ 43.3
Man-made	43,202	324,923	- 86.7	339	1,203	- 71.8

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Furnishings, 1980, 1981
(continued)

	Quantity (Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Underwear, total (continued)						
Knit	421,244	552,601	- 23.8%	$ 6,488	$ 7,606	- 14.7%
Cotton	278,736	477,811	- 41.7	4,644	6,816	- 31.9
Man-made	142,508	74,490	+ 91.3	1,844	790	+133.4
Underwear, other than briefs, drawers & undershorts	525,124	503,954	+ 4.2	5,647	6,008	- 6.0
Not knit	292,760	165,817	+ 76.6	2,346	1,051	+123.2
Cotton	85,304	26,108	+226.7	1,058	390	+171.3
Man-made	207,456	139,709	+ 48.5	1,288	661	+ 94.9
Knit	232,364	338,137	- 31.3	3,301	4,957	- 33.4
Cotton	151,960	278,386	- 45.4	2,315	4,272	- 45.8
Man-made	80,404	59,751	+ 34.6	986	685	+ 43.9
Underwear, nspf, of textile material not specified	118,377	53,074	+123.0	1,891	835	+126.5
Not knit	21,090	13,435	+ 57.0	334	242	+ 38.0
Knit	97,287	39,639	+145.4	1,557	593	+162.6
T-shirts, all white, knit	1,926,285	1,573,965	+ 22.4	26,890	31,063	- 13.4
Cotton	1,609,060	1,267,818	+ 26.9	20,767	21,381	- 2.9
Man-made	317,225	306,147	+ 3.6	6,123	9,682	- 36.8
Neckties, textile materials	120,932	89,691	+ 34.8	2,095	1,519	+ 37.9
Not knit	103,667	68,162	+ 52.1	1,752	1,186	+ 47.7
Knit	17,265	21,529	- 19.8	343	333	+ 3.0
Hosiery, cotton (dozen pairs)	1,188,978	1,177,535	+ 1.0	9,689	9,872	- 1.9

nspf = not specially provided for.

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges of transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1981 and 1980.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

According to Census Bureau estimates of the U.S. population in 1982, by age group, males aged 20-34 accounted for the largest percentage (27.3%) of any age group in the male population. Projections made by the Census Bureau indicate that by the year 1990, men in the 35-49 year old age bracket will increase by over 30% and constitute 21.1% of the male population compared with 25.8% share for the 20-34 year olds. By the year 2000, however, the 20-34 year old group will slide to 20.8% of total male population, to be surpassed by the 35-49 year old group which is expected to represent 24.2% of all males in that year.

Male Population of the U.S., 1982 & Projections to 2000
(Millions of Males)

					% Change	% of Male Population			
	1982	1985	1990	2000	2000/1982	1982	1985	1990	2000
Total, all ages	112.9	116.1	121.5	130.4	+ 15.5%	100.0%	100.0%	100.0%	100.0%
Under 16 years	28.1	28.4	29.6	30.6	+ 8.9	24.9	24.5	24.4	23.5
16 years & over	84.8	87.7	91.9	99.8	+ 17.7	75.1	75.5	75.6	76.5
16-19 years	8.3	7.5	7.0	7.7	- 7.2	7.4	6.5	5.8	6.9
20-34 years	30.8	31.7	31.3	27.1	- 12.0	27.3	27.3	25.8	20.8
35-49 years	19.2	21.5	25.6	31.6	+ 64.6	17.0	18.5	21.1	24.2
50-64 years	15.8	15.6	15.4	19.7	+ 24.7	14.0	13.4	12.7	9.7
65 years & over	10.8	11.5	12.7	13.7	+ 26.9	9.6	9.9	10.5	10.5
Median age in years	29.3	30.2	31.8	34.9					

Source: U.S. Bureau of the Census,
Population Estimates and Projections,
Series P-25, No. 922 (October 1982).

The following table covers estimates on the current adult male population (18-74 years of age) in specific height/weight groups, based on an analysis of information from the U.S. Department of Health, Education & Welfare (now renamed the Department of Health and Human Services) and from the U.S. Census Bureau.

Close to 2.5 million men, 3.3% of all adult male population stand six feet two inches or taller. At the other end of the spectrum, over ten million men, 13.6% of males are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

THE POTENTIAL MARKET FOR MEN'S FURNISHINGS

Distribution of the U.S. Male Population by Height/Weight Groups, 1982
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	75,274	10,237	27,023	35,529	2,485
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	16,937	5,119	6,925	4,742	151
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	31,464	3,764	13,323	14,001	376
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	14,829	903	4,516	8,732	678
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,033	376	1,882	6,022	753
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,011	75	377	2,032	527
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES

Current Trends

According to a national sales projection compiled by NPD Research Inc., which tracks purchases of 6,500 families, sales of all men's and boys' wear in the 12-month period ending September 1982 were slightly below (-0.2%) projected sales figures for the same period a year earlier.

The men's and boys' hosiery classification registered strongest in product classifications reported on by NPD (+2.6%). Other winners were in the furnishings classification: pajamas, robes (+1.1%); accessories (included with furnishings in some retail operations) were also up over one percent.

Men's & Boys' Wear Sales In Reported Classifications

	Percent Change 10/81-9/82 vs. 10/80-9/81
Men's & boys' wear, total	- 0.2%
Underwear	-0-
Socks, hosiery	+ 2.6
Pajamas, robes	+ 1.1
Accessories	+ 1.1

(continued)

RETAIL SALES

Current Trends

Men's & Boys' Wear Sales In Reported Classifications (continued)

	Percent Change 10/81-9/82 vs. 10/80-9/81
Shirts, sweaters, other tops	- 1.4%
Suits, sport coats, vests	- 0.8
Coats, outer jackets	- 7.5
Pants, jeans, slacks, shorts	+ 2.0

Source: NPD Textile and Apparel Service,
NPD Research Inc.

Dress Shirts

Sales of men's dress shirts in 1982 were bouyed by consumer resistance to higher-ticket apparel while still wanting to update wardrobes. Shirts, as well as other furnishing items, have been seen as an inexpensive method of refurbishing an aging wardrobe. Industry analysts indicate that in 1981 unit sales of dress shirts increased by approximately 5% over 1980 with consumers tending to pay higher prices for their shirts.

Neckwear

1982 was a record year for neckwear sales with many retailers reporting double digit increases in their volume from the previous year. Designer labels, popular among younger men, are reported to be responsible for much of the increase.

Underwear

Consumer acceptance of fashion underwear, with its emphasis on styling and color has helped boost overall men's underwear sales from 5%-10% from the $1.3 billion reported in 1981. Fashion underwear's share is currently estimated at from 15%-20% of the underwear market. With consumers showing little resistance to price points, that range to as much as 50% higher than classic underwear prices, retailers expect the boom to continue.

Other items such as jewelry, small leather goods, etc., are generally considered to be in the accessories field and information about them may be found in the Fact File covering Fashion Accessories (Men's and Women's). Additional information on the hosiery industry is included as a part of the Hosiery/Legwear (Men's, Women's and Children's) Fact File. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear and Jeans Fact File.

RETAIL SALES BY STORE TYPE

The latest official information on men's furnishings sales is contained in the 1977 Census of Retail Trade compiled by the U.S. Census Bureau. Data, however, is incomplete as only stores with payrolls were included in the merchandise line reports and not all store types (for example, supermarkets) which sell men's furnishings items were required to supply detailed information on sales by type of merchandise.

Shirts

Census data covered both dress and sport shirts for men. Department stores accounted for about 18% of the reporting stores and almost 51% of reported sales of shirts in 1977.

Reported Sales of Men's Dress & Sport Shirts (Woven)
By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's dress & sport shirts	42,404	100.0%	$2,625.1	100.0%
Department stores**	7,702	18.2	1,336.3	50.9
Men's wear stores	16,894	39.8	798.4	30.4
Family clothing stores	12,578	29.7	412.2	15.7
Other (women's ready-to-wear stores, men's shoe stores, mail order houses)	5,230	12.3	78.3	3.0

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Hosiery, Pajamas & Underwear

Department stores, accounting for 19.0% of all stores reporting sales of men's hosiery, pajamas & underwear in 1977, garnered over 65% of the categories volume in that year. Overall retail sales of the group reached $1.4 billion in 1977 although outlet types such as supermarkets, drug stores, variety stores, etc. were not included in the census data on furnishings sale.

Reported Sales of Men's Hosiery, Pajamas & Underwear
By Store Type, 1977
(Includes only stores with payroll)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's hosiery, pajamas & underwear	36,570	100.0%	$1,370.0	100.0%
Department stores**	6,943	19.0	902.8	65.9
Men's wear stores	12,300	33.6	203.5	14.9
Family clothing stores	9,372	25.6	190.5	13.9
Family shoe stores	3,105	8.5	28.0	2.0
Men's shoe stores	517	1.4	3.7	0.3
Mail order houses	3,572	9.8	31.8	2.3
Women's ready-to-wear stores	761	2.1	9.7	0.7

(See footnotes for table on men's dress & sport shirts.)

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

RETAIL SALES BY STORE TYPE

Sales Contribution To Total Men's & Boys' Wear Business

Percent of Total Men's & Boys' Wear Sales Accounted For By Specified Men's Furnishings In Key Store Types Reporting Sales, 1977

	Total Men's & Boys' Wear Sales Mil. $	% of Total Men's/Boys' Wear Sales - Specified Men's Items		
		Dress & Sport Shirts	Novelty/ Knit Shirts	Hosiery, Pajamas Underwear
Department stores	$10,574.9	12.6%	3.5%	8.5%
Men's wear stores	6,275.4	12.7	3.6	3.2
Family clothing stores	3,001.5	13.7	3.4	6.3

Source: Based on U.S. Bureau of the Census,
Census of Retail Trade, 1977.

Men's Wear Stores

Men's & Boys' Clothing & Furnishings Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Men's & boys' clothing & furnishings stores, total	18,106	100.0%	140,240	100.0%	$1,271.9	100.0%
By establishment size:						
Under 10 employees	13,994	77.3	62,732	44.7	542.9	42.7
10 to 19 employees	3,804	21.0	41,509	29.6	361.3	28.4
20 to 49 employees	910	5.0	25,841	18.4	252.0	19.8
50 to 99 employees	99	0.5	6,546	4.7	71.1	5.6
100 or more employees	19	0.1	3,612	2.6	44.6	3.5

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

Number of Stores & Sales of Men's & Boys' Wear Stores

	January-October			Annual Averages				
	1982	1981	% Change 1982/1981	1981	1980	1979	% Change 1981/1980	% Change 1981/1979
Total sales (mil. $)	$5,639	$5,682	- 0.8%	$7,768	$7,830	$7,830	- 0.8%	- 0.8%
No. of stores	na	na	na	na	18,106	18,517	na	na

na = not available

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-81S,
Monthly Retail Sales BR-82-10,
County Business Patterns, 1980, 1979.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

The only category to register a decline in sales in the typical men's specialty store in 1981 was sleepwear (-0.2%) according to information supplied by the Menswear Retailer of America. The largest gain was recorded by neckwear, whose 1981 sales rose a median 12.9% over the 1980 level.

Selected 1981 Merchandising & Operating Results in Men's Wear Stores
(Median Results)

	Men's					
	Dress Shirts	Neckwear	Hosiery	Underwear	Sleepwear	Headwear
% change in sales from last year (60)*	+ 4.0%	+12.9%	+11.4%	+ 8.1%	- 0.2%	+ 3.3%
% of total store sales (71)*	6.7	3.2	1.1	1.5	0.9	0.7
% of men's furnishings sales (71)*	35.5	18.9	6.6	8.6	4.9	4.3
% distribution of average inventory in men's furnishings dept. (37)*	36.0	14.2	5.1	8.9	5.2	4.7
Markdowns, % of men's furnishings sales (45)*	9.4	8.3	2.7	3.4	6.7	14.2
Number of stock turns (37)*	1.8	2.5	2.3	1.7	1.6	1.3

*Number in parenthesis refers to the number of reporting firms in each category.

Source: Menswear Retailers of America,
1981 Annual Business Survey.

Department Stores

Department Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Department stores, total	9,240	100.0%	1,590,940	100.0%	$12,166.5	100.0%
By establishment size:						
Under 50 employees	1,159	12.5	45,372	2.9	323.5	2.7
50-99 employees	2,326	25.2	172,894	10.9	1,182.8	9.7
100-249 employees	4,132	44.7	639,536	40.2	4,479.6	36.8
250-999 employees	1,564	16.9	619,226	38.9	4,969.2	40.8
1,000 or more employees	59	0.7	113,912	7.1	1,211.4	10.0

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

According to the National Retail Merchants Association, men's furnishings sales in department stores with total sales over $1 million rose from a median 13.7% in 1981 from the year before. Typical sales per square foot of selling space were much higher for men's furnishings than for the entire upstairs store in general.

RETAIL SALES BY STORE TYPE

Department Stores

Sales of men's ties increased a median of 20.8% in 1981, while dress shirts sales rose 16.8%.

Selected 1981 Merchandising & Operating Results of Men's Furnishings In Department Stores With Sales Over $1 Million

(Median Results)

	Total Upstairs Store (143)*	Adult Male Apparel (111)*	Men's Furnishings** (100)*	Men's Dress Shirts (39)*	Men's Ties (31)*
Net sales, % change from last year	+ 6.7	+ 11.0	+ 13.7	+ 16.8	+ 20.8
Sales, % of merchandise division	nr	100.0	45.8	10.4	4.1
Sales, % of total store	90.1	12.4	5.7	1.3	0.5
$ sales per square foot of selling space (main or largest selling unit)	$111.8	$176.9	$185.1	$145.0	nr
Cumulative markon, %	48.0	50.3	50.6	49.3	55.1
Gross margin, % of sales (incl. cash discounts)	42.0	43.5	45.9	45.1	55.0
Markdowns, % of retail sales	13.0	12.5	10.3	9.8	6.1
Number of stock turns	2.7	2.8	3.1	2.9	3.5
Selling salaries, % of sales (main or largest selling unit)	7.5	6.8	6.4	6.1	6.1
Sales promotion costs, % of sales	3.2	2.9	2.9	4.3	2.4

nr = not reported

*Number in parenthesis refers to the number of reporting stores in each category.

**Men's furnishings include sport shirts, sweaters, vests, dress shirts, hosiery, pajamas, robes and underwear.

Source: National Retail Merchants Association, 1981 Merchandising & Operating Results, (1982 Edition)

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments

(Five Year Average)*

Month	Percent of Total Sales
January	4.7%
February	4.7
March	5.1
April	5.6
May	6.5
June	9.7
July	5.8
August	5.3

(continued)

RETAIL SALES BY STORE TYPE

Department Stores

Seasonal Patterns in Sales of Men's Furnishings & Hat Departments
(Five Year Average*)
(continued)

Month	Percent of Total Sales
September	5.9%
October	7.3
November	11.5
December	27.9
Five year average	100.0%

*Based on Federal Reserve Board Figures (1961-1965) (Latest available).

Source: Newspaper Bureau of Advertising.

CONSUMER PRICES

The consumer price index for men's furnishings and special clothing (uniforms, etc.) rose 6.7% in 1982 well above the 3.8% registered by all men's apparel during that same period. Men's shirt prices (retail) rose 3.1% between 1981 and 1982.

Consumer Price Index for Specified Men's Furnishings 1980-1982
(Index for all Urban Consumers)
(December 1977=100)

	1982(p)	1981	1980	% Change 1982/1981	% Change 1982/1980
All men's wear	116.0	111.7	106.0	+ 3.8%	+ 9.4%
Men's furnishings & special clothing	138.4	129.7	118.4	+ 6.7	+ 16.9
Men's shirts (dress & sport)	122.4	118.7	113.7	+ 3.1	+ 7.7

(p) = preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL ADVERTISING PATTERNS BY MONTH

Dress Shirt Retail Advertising
Percent of Year's Total Newspaper Linage Used Each Month, 1981

Month	Dress Shirts
January	4.3%
February	4.8
March	5.9
April	7.3
May	7.9
June	16.3
July	4.2
August	4.2
September	9.3
October	7.7
November	11.4
December	16.7
Total	100.0%

Source: The Advertising Checking Bureau, Inc.-
Neustadt Reports Div. (based on retail
newspaper advertising linage in 7 markets:
Chicago, Philadelphia, Cincinnati, Dallas,
Cleveland, Los Angeles and Washington, D.C.)

CONSUMER BUYING HABITS

Dress Shirts

The following tables on specified men's furnishings items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an ongoing monthly panel diary, tracking the purchases of 6,500 nationally representative families.

Dress Shirt Purchases by Price Point
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
Under $5.00	16.1	20.4
$5.00 - $9.99	37.1	38.0
$10.00 - $14.99	25.7	26.2
$15.00 - $20.00	13.9	10.8
Over $20.00	9.2	4.6

(continued)

CONSUMER BUYING HABITS

Dress Shirts

Dress Shirt Purchases by Type of Fabric
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
All nylon	1.8	2.9
Cotton/polyester	13.6	9.2
All cotton	6.0	8.7
All polyester	10.7	12.3
Polyester/cotton	67.9	66.9

Dress Shirt Purchases by Type of Outlet
(Percent of Units Purchased)

	10/81 - 9/82	10/80 - 9/81
Total Units	100.0%	100.0%
Department stores	33.0	32.2
Discounters	20.9	19.4
Specialty stores	15.4	15.9
Chains	25.8	26.4
Other	4.8	6.1

In an R.H. Bruskin survey 1,000 men and women, selected to mirror the national population, were asked to indicate their store preferences when buying men's dress shirts. The results were published in Daily News Record (August 19, 1982) and indicated that 45% of all respondents ranked department stores as the type in which they were most likely to purchase dress shirts. Specialty stores ranked next, followed (in descending order) by chain stores and discounters.

CONSUMER BUYING HABITS

Dress Shirts

Expectation of Next Place of Purchase of Men's Dress Shirts

	Department Stores	Specialty Stores	Chain Stores*	Discount Stores	All Others	No Answer
Total, all respondents	45%	28%	15%	3%	4%	5%
Sex:						
Male	37	33	17	3	5	5
Female	53	24	14	1	3	5
Age:						
18-24 years	41	30	17	1	9	2
25-34 years	50	37	12	3	4	4
35-49 years	54	26	10	3	3	4
50-64 years	46	30	17	1	2	5
65 & over	31	32	20	3	3	11
Income:						
Under $15,000	36	29	19	2	4	11
$15,000-$19,999	44	31	12	4	4	5
$20,000-$29,999	50	24	18	3	3	2
$30,000-$39,999	56	27	10	2	4	1
$40,000 & over	49	35	8	1	6	1
Region:						
Northeast	48	27	13	1	4	7
North Central	40	33	17	4	3	3
South	46	27	15	1	6	6
West	49	27	15	1	4	4

*The national chains figures includes retailers such as Sears, Penneys & K mart.

Note: Figures represent percent of all respondents in each category who expect to shop in that store type. Example: 41% of all respondents 18-24 years old expect to purchase their next dress shirt in a department store while 30% expect to buy in a specialty store. Totals may not add to 100.0% due to rounding.

Neckwear

Men's Neckwear Purchases by Store Type
(Percent of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Department stores	31.3	33.5
Chain & mail order	17.9	18.2
Discounter outlets	19.8	17.1
Specialty shops	25.8	22.4
Other outlets	5.2	8.8

CONSUMER BUYING HABITS

Neckwear

Men's Neckwear Purchases by Price Point
(Purchases of Units Sold)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Under $2.00	5.3	5.5
$2.00 to $3.99	17.3	24.2
$4.00 to $5.99	31.0	27.3
$6.00 to $7.99	19.9	20.8
$8.00 to $9.99	11.5	9.3
$10.00 to $11.99	7.8	6.2
$12.00 & over	7.2	6.7

Underwear

Discount stores were the favored place of purchase for men's underwear, according to the NPD panel information.

Men's Underwear Purchased by Type
(Percentage of Units Purchased)

	1982	1981
Total	100.0%	100.0%
T-shirts	28.3	30.0
V-necks	5.8	5.5
A-shirts	4.6	5.4
Briefs	51.0	48.1
Boxers	8.4	9.4
Bikinis	1.9	1.6

Men's Underwear Purchases by Store Type
(Percentage of Units Purchased)

	1982	1981
Total	100.0%	100.0%
Chains	17.9	16.2
Department stores	24.0	27.8
Discounters	38.9	36.3
Specialty stores	4.6	4.4
Other outlets	14.6	15.3

CONSUMER BUYING HABITS

Underwear

Underwear Purchases by Price Point
(Percentage of Units Sold)

	1982	1981
Total	100.0%	100.0%
Under $1.00	14.8	19.5
$1.00 to $1.49	30.3	31.9
$1.50 to $1.99	23.5	23.8
$2.00 to $2.99	22.6	20.2
$3.00 & over	8.8	6.6

Source for the above tables: NPD Research.

Hosiery

Men's Hosiery Purchases by Type
(Percentage of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Dress socks	28.9	29.5
Casual socks	23.9	23.2
Athletic socks	25.2	24.8
Work socks	16.7	17.5
Support socks	1.2	1.5
Other socks	4.1	3.5

Men's Hosiery Purchases by Store Type
(Percentage of Units Sold)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Chains	18.3	18.5
Department stores	15.1	14.4
Discounters	41.0	39.1
Specialty stores	4.7	6.4
Other stores	20.9	21.6

Men's Hosiery Purchases by Price Point
(Percentage of Units Purchased)

	7/81 - 6/82	7/80 - 6/81
Total	100.0%	100.0%
Under $ .50	8.0	9.3
$ .50 to $ .99	39.7	46.1
$1.00 to $1.49	27.5	25.1
$1.50 to $1.99	12.8	9.6
$2.00 to $2.49	4.6	4.5
$2.50 & over	7.4	5.4

Source for the above tables: NPD Research.

MEN'S WORK WEAR

Market Trends

Once thought to be recession-proof, men's work wear has proved to be much the same as most other areas of apparel, suffering from the ill-effects of the current recession. Sales of work wear are now estimated to stand at $1.3 billion annually, nearly the same level the category recorded in 1980.

Industry analysts point out that the consumer demand for high-ticket hardgoods has suffered tremendously over the last two years, thus resulting in heavy unemployment among the work wear industry's prime consumers.

Over the last several years the work wear industry has been dependent on consumer acceptance of the category as a fashion fad in order to register major growth. The most recent occurrence of this fad was in 1980 when the "authentic work wear" craze swept the country. This fad, which included such items as painters' pants and bib overalls, brought many non-traditional consumers into the industry, but as the trend faded, no new one replaced it. On the other hand, the preference for casual wear, including jeans, for wear at work has continued to make inroads in the work wear market.

Production of work wear registered a slight 3.8% increase in 1981 despite nearly 40% gains shown by both the coverall, overall and jumpsuit category as well as the overall and work-type jacket group. These gains were nearly offset by an 8.2% decline to 3.3 million units registered by the work shirts category.

Industry studies have found that nearly one out of four workers in the labor force today are supplied with clothes or uniforms by their employers, while another 16% have bought something from the category on their own within the past year.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intra-censal periods the Bureau conducts annual surveys among a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1980 Annual Survey of Manufacturers, the value of industry shipments (including both primary and secondary products and miscellaneous receipts) produced by manufacturers classified in the men's work wear industry reached $4.3 billion, a 12.9% increase over the 1979 shipment value of $3.8 billion.

GENERAL STATISTICS ON THE INDUSTRY

AT THE MANUFACTURER LEVEL

Work Wear (SIC 2328*)

	1928(e)	1981(e)	1980	1979	1977
Number of companies	na	na	na	na	347
Number of establishments, total**	na	na	604	605	656
Number with 20 or more employees	na	na	522	528	575
Employees, total (thous.)	105.7	108.1	101.7	105.0	113.7
Production workers (thous.)	93.1	96.8	99.4	94.9	101.6
Payroll (mil. $)	na	na	$ 881.1	$ 775.1	$ 719.4
Value added by manufacture# (mil. $)	$2,332	$2,165	$2,263.3	$1,998.6	$1,765.4
Value of industry shipments## (mil. $)	$4,811	$4,784	$4,290.8	$3,800.9	$3,641.9
Capital expenditures, new (mil. $)	na	na	$ 87.4	$ 66.5	44.1

(e) = estimated
na = not available

*SIC 2328 comprises establishments primarily engaged in manufacturing men's, youths' and boys' work shirts, pants, jeans, and other work clothing and washable service apparel. As noted above, uniforms and career apparel are not included, as they are primarily produced in the tailored clothing industry. For 1977 the 656 establishments (plants) in the industry included 361 manufacturers, 41 jobbers, 91 independent contractors and 163 multiplant company contractors.

**Each business location is counted as a separate establishment. (Data for 1979 and 1980 are from the U.S. Census report, County Business Patterns.)

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The values of primary products (men's work clothing) alone, of these industries, plus the value of shipments by manufacturers classified in other industries who make suits, etc., as secondary products, are shown on page 45.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980;
U.S. Bureau of Industrial Economics,
1983 Industrial Outlook.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment in the men's work wear category shrank dramatically between October 1981 and October 1982, falling 5.7%, to 65.6 thousand employees. Production workers representation in the total also shrank, down to 83.5% in 1982 from 83.9% a year earlier.

Average weekly earnings for production workers in the industry in October 1982 jumped to $172.31, up 13.3% from the $152.15 registered in October 1981. The 1982 figure was also well above the annual average of $153.64 recorded for the total year 1981.

Employment & Earnings in the Work Wear Industry

	Monthly Averages			Annual Averages		
	Oct. 1982(p)	Oct. 1981	% Change	1981	1980	% Change 1981/1980
Work clothing (SIC 2328*)						
All employees (thous.)	95.6	101.4	- 5.7%	104.0	100.0	+ 4.0%
Production workers (thous.)	79.8	85.1	- 6.2	86.9	84.3	+ 3.1
Avg. weekly earnings	$172.31	$152.15	+13.3	$153.64	$142.49	+ 7.8
Avg. hourly earnings	$ 4.76	$ 4.18	+13.9	$ 4.13	$ 3.82	+ 8.1
Avg. weekly hours	36.2	36.4	- 0.5	37.2	37.3	- 0.3
Avg. overtime hours	0.9	1.1	-18.2	1.3	1.2	+ 8.3

(p) = preliminary
* For a definition of this SIC code, see page 41.

Source: U.S. Bureau of Labor Statistics, Employment and Earnings.

Firms with less than 250 employees were most prevalent in 1980 in the work clothing industry, according to the U.S. Bureau of the Census. However, firms with over 250 employees were responsible for more than 37% of all employees in the industry in that same year.

Manufacturing Establishments in the Work Wear Industry
By Employment Class Size, 1980

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Men's & boys' work clothing (SIC 2328*), total	604	100.0%	915,545	100.0%
By establishment size:				
Under 50 employees	136	22.5	(D)	--
50 - 99 employees	102	16.9	61,993	6.8
100 - 249 employees	208	34.4	272,493	29.8
250 - 499 employees	124	20.5	342,001	37.4
500 or more employees	34	5.6	(D)	--

*For a definition of this SIC code, see page 41.
(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census, County Business Patterns, 1980 (CBP-80-1).

GENERAL STATISTICS ON THE INDUSTRY

Manufacturers' Operating Ratios

Selected Operating Ratios for Manufacturers In the Work Clothing Industry, 1980
(Median Results)

	Work Clothing (SIC 2328*) (60)**
Current assets to current debt (times)	1.96
Net profits on net sales (percent)	2.59
Profits on net worth (percent)	11.93
Sales to net worth (times)	4.38

*For a definition of this SIC code, see page 41.
**Number in parenthesis refers to the number of reporting companies in the industry.

Source: Dun & Bradstreet,
Key Business Ratios 1980,
All rights reserved.

LOCATION OF THE INDUSTRY

Leading States in the Manufacture of Work Clothing, 1977

	No. of Establishments		Value Added by Manufacturer (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Work clothing (SIC 2328*)				
Leading states:				
Texas	78	70	$ 305.0	$ 588.5
Tennessee	74	70	316.9	642.2
Georgia	57	53	157.9	323.1
Mississippi	49	49	136.6	266.6
Alabama	42	39	81.2	139.2
California	39	22	99.4	279.8
Kentucky	35	34	72.7	137.7
Missouri	36	31	66.5	110.3
New York	32	20	13.0	28.6
U.S. total	656	388	1,765.4	3,641.9
Leading states, total	442	575	1,249.2	2,516.0
Percent of U.S. total	67%	68%	71%	69%

*For a definition of SIC code, see page 41.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

PRODUCTION

Information on production and shipments of work wear is compiled annually by the U.S. Census Bureau and published in the Current Industrial Reports series. This is based on a survey of manufacturers, government contractors and jobbers, except for very small firms (less than five employees).

Production of Specified Types of Work Wear, 1980, 1981

	Thousands of Units		% Change
	1981	1980	1981/1980
Work wear, total (men's only, except where noted)	269,936	292,362	--
Jeans & dungarees	142,340	166,494	- 14.5%
Work pants, incl. waistband overalls	40,620	39,276	*
Coveralls, overalls, jumpsuits	18,036	13,044	+ 38.3
Washable service apparel	18,852	18,324	+ 2.9
Work shirts (men's & boys')	39,204	42,720	*
Uniform shirts	6,804	9,552	- 28.8
Overall & work-type jackets (men's & boys')	4,080	2,952	+ 38.2

*In 1981 the Census Bureau broadened its coverage of the apparel industry, adding manufacturers who were not included in the survey covering 1980. This has affected comparability within product classifications to varying degrees. In the case of work pants, 10% of 1981 production was accounted for by the newly-added manufacturers; in work shirts, 7.0%. Figures for the two years in these classifications are, therefore, not comparable. In other products shown, the effect of the additional reporting manufacturers was very minimal or non-existent.

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(81)-1) (issued December 1982).

By Fabric/Construction

Production of Specified Types of Men's & Boys' Work Wear By Type of Fabric & Construction, 1980, 1981
(Thousands of Dozens)

	1981	% of 1981 Total	1980
Men's jeans & dungarees	11,861	100.0%	13,874
All cotton & chiefly cotton	10,776	90.8	13,527
All man-made & chiefly man-made	665	5.6	347
Fabric, n.s.k.	421	3.6	--

(continued)

PRODUCTION

By Fabric/Construction

Production of Specified Types of Men's & Boys' Work Wear By Type of Fabric & Construction, 1980, 1981
(Thousands of Dozens)

	1981	% of 1981 Total	1980
Men's work pants, incl. waistband overalls	3,385	100.0%	3,273 *
By construction:			
Woven fabric	2,889	85.3	3,156
Knit fabric	57	1.7	117
Construction, n.s.k.	439	13.0	--
By fabric:			
All cotton & chiefly cotton	731	21.6	925
All man-made & chiefly man-made	2,079	61.4	2,042
Fabric, n.s.k.	575	17.0	306
Men's coveralls, overalls & jumpsuits	1,503	100.0%	1,087
By construction:			
Woven fabric	1,385	92.1	1,087
Knit fabric			
Construction, n.s.k.	145	9.6	
By fabric:			
All cotton & chiefly cotton	600	39.9	664
All man-made & chiefly man-made	495	32.9	423
Fabric, n.s.k.	248	16.5	--
Men's washable service apparel			
By fabric:	1,571	100.0%	1,527
All cotton & chiefly cotton	217	13.8	205
All man-made & chiefly man-made	827	52.6	801
All other fabric	100	6.4	128
Fabric, n.s.k.	431	27.4	393
Men's & boys' work shirts	3,267	100.0%	3,560
By fabric:			
All cotton & chiefly cotton	690	21.1	858
All man-made & chiefly man-made	2,302	70.5	2,467
All wool & chiefly wool	275	8.4	235
All other fabric			
Fabric, n.s.k.			
Men's & boys' overall & work type jackets	340	100.0%	246
By fabric:			
All cotton & chiefly cotton	86	25.3	97
All man-made & chiefly man-made	149	43.8	149
Fabric, n.s.k.	105	30.9	---

*See footnote on previous page

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's Outerwear, MA-23E(81)-1.

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed In the Production of Work Wear, 1972, 1977

	Delivered Cost (mil. $)		
	1977	1972	% Change 1977/1972
Work wear (SIC 2328*):			
Broad woven fabrics	$1,194.5	$521.7	+129.0%
Purchased knitted fabrics	23.8	51.9	- 54.1

*For a definition of this SIC code, see page 41.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC77-1-23A.

Seasonality in Production

Based on reports from the U.S. Census Bureau on production of men's work wear, June and October are the busiest months for cuttings of both men's work pants and men's work shirts. June accounted for 9.3% of total 1981 cuttings in work pants, while October represented 9.6% of 1981 work shirt cuttings.

Percent of Cuttings Done by Month of Selected Types of Men's Work Wear 1980, 1981

	Men's Work Pants		Men's Work Shirts	
	1981	1980	1981	1980
Total	100.0%	100.0%	100.0%	100.0%
January	8.2	7.5	7.6	8.3
February	7.9	7.5	7.4	8.2
March	8.7	7.6	7.6	8.8
April	8.9	8.3	8.8	9.2
May	8.8	7.7	9.0	8.5
June	9.3	8.4	9.2	8.3
July	7.2	7.0	7.7	7.5
August	8.2	9.0	8.8	7.8
September	8.9	9.4	8.4	7.9
October	9.1	9.2	9.6	9.2
November	8.1	9.6	8.5	8.5
December	6.7	8.8	7.4	7.8

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1.

SHIPMENTS

The value of shipments of work wear in the following table covers the total value reported by all manufacturers, regardless of the manufacturers' industry classification. This product basis differs from the "industry shipment" data as described in the Industry Section of this report.

The information on product shipments reported below for 1978-1980 are based on findings in a sample survey of manufactures conducted annually by the Census Bureau, to update figures reported every five years in the complete census of manufactures, the latest of which covered the year 1977.

Value of Shipments of Work Wear, 1977-1980
(Millions of Dollars)

	1980	1979	1978	1977	% Change 1980/1979
Men's & boys' work clothing	$4,086.8	$3,625.2	$3,470.5	$3,394.1	+ 12.7%
Men's & boys' work shirts	221.1	255.8	188.3	191.6	- 13.6
Men's & boys' jeans & jean cut casual slacks	2,636.3	2,236.5	2,106.5	1,962.8	+ 17.9
Men's & boys' work clothing, n.e.c.	572.4	509.7	767.8	729.6	+ 12.3
Contract work on men's & boys' work clothing	488.5	404.1	418.0	410.6	+ 20.9
Work clothing, n.s.k.	168.5	219.0	80.0	99.5	- 23.1

n.e.c. = not elsewhere classified
n.s.k. = not specified by kind

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Annual Survey of Manufacturers,
Value of Product Shipments, M80(AS)-2.

Based on a survey of all manufacturers, government contractors and jobbers, except for very small firms, the U.S. Census Bureau also compiles shipments (as well as production data) for specific types of men's work wear on an annual basis. These are published in the Current Industrial Reports series.

Value of Shipments of Work Wear, 1980, 1981

	Millions of Dollars 1981	1980	% Change 1981/1980
Work wear, total (men's only, except where noted)	$2,312.7	$2,152.1	--
Jeans & dungarees	1,401.4	1,379.3	+ 1.6%
Work pants, incl. waistband overalls	318.2	268.7	*
Coveralls, overalls, jumpsuits	214.7	155.9	+ 37.7
Washable service apparel	87.1	90.8	*

(continued)

SHIPMENTS

Value of Shipments of Work Wear, 1980, 1981
(continued)

	Millions of Dollars		% Change
	1981	1980	1981/1980
Work shirts (men's & boys')	$ 241.5	$ 225.8	+ 7.0%
Uniform shirts	na	na	--
Overall & work type jackets (men's & boys')	49.8	31.8	+ 56.6

*See footnote on Production of Specified Types of Work Wear, 1980, 1981.
na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(81)-1) (issued December 1982).

The 1981 annual CIR on gloves and mittens indicates that shipments of work gloves and mittens fell in both quantity and value between 1980 and 1981. However, the all-fabric gloves and mittens categories did manage to register gains in the value of shipments during the period (up 2.4%), but not on a pairage basis.

The all fabric glove category accounts for the largest segment of the work glove industry, accounting for over 80% of all glove shipments on a unit basis.

Quantity & Value of Shipments of Work Gloves & Mittens, 1980, 1981
(Quantity in 1,000 dozen pairs; value in million dollars)

	Quantity		% Change	Value		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Work gloves & mittens, total	24,998	25,181	- 0.7%	$338.9	$340.1	- 0.4%
All-fabric	22,242	22,303	- 0.3	195.0	190.5	+ 2.4
Single canton flannel	4,865	5,560	- 12.5	na	na	
Double canton flannel	4,034	4,035	--	na	na	
Fleeced cotton jersey	4,105	4,329	- 5.2	na	na	
Circular knit cotton	4,168	4,130	+ 0.9	na	na	
Coated & partially coated fabrics	2,694	2,229	+ 20.9	na	na	
All other fabrics	522	541	- 3.5	na	na	
Fabric work gloves & mittens, n.s.k.	1,403	1,407	- 0.3	12.3	12.0	+ 2.5
Leather & fabric combination	903	953	- 5.2	35.3	37.3	- 5.4
All leather work gloves	1,853	1,925	- 3.7	108.6	112.3	- 3.3
All grain, exc. welders	1,053	993	+ 6.0	na	na	
All split, exc. welders	279	324	- 13.9	na	na	
Leather, exc. all grain & all split, incl. welders	378	462	- 18.2	na	na	
Leather work gloves, n.s.k.	141	146	- 3.4	na	na	

na = not available n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Gloves and Mittens, MA-23D(81)-1.

SHIPMENTS

By Region

North Carolina accounted for nearly 20% of all work glove and mitten shipments in the U.S. in 1977 registering the highest percentage of shipments of any state in any category of the men's work wear industry. Tennessee was responsible for 17.7% of all work clothing shipments in 1977 while Texas' 14.5% was the highest percentage in the contract work on men's work wear segment.

Value of Shipments of Work Wear by Leading States, 1977

	Value of Shipments (Mil. $)	% of Total
Work Clothing		
Leading states:		
Tennessee	$ 129.5	17.7%
Texas	127.1	17.4
Kentucky	82.4	11.3
Georgia	48.2	6.6
Indiana	48.0	6.6
Mississippi	44.5	6.1
Missouri	37.7	5.2
California	33.5	4.6
Alabama	23.5	3.2
Arkansas	16.7	2.3
Leading states, total	591.1	81.0
U.S. total	729.7	100.0
Contract work on work clothing		
Leading states:		
Texas	59.6	14.5
Tennessee	50.8	12.4
Alabama	50.6	12.3
Oklahoma	47.1	11.5
Mississippi	31.1	7.6
Georgia	26.1	6.3
Missouri	24.6	6.0
Kentucky	20.7	5.0
North Carolina	13.3	3.2
Pennsylvania	11.6	2.8
Leading states, total	335.5	81.6
U.S. total	411.2	100.0
Work gloves & mittens		
Leading states:		
North Carolina	51.9	19.7
Mississippi	36.2	13.8
Missouri	23.0	8.7
Georgia	16.1	6.1
Pennsylvania	7.6	2.9

(continued)

SHIPMENTS

By Region

Value of Shipments of Work Wear by Leading States, 1977
(continued)

Work gloves & mittens (cont'd.)	Value of Shipments (Mil. $)	% of Total
Illinois	$ 6.4	2.4%
Texas	5.0	1.9
Indiana	4.8	1.8
Michigan	3.9	1.5
Virginia	2.8	1.1
Leading states, total	157.7	60.0
U.S. total	263.0	100.0

Source: U.S. Bureau of the Census,
1977 Census of Manufactures,
Industry Series, MC77-1-23A.

PRODUCER PRICES

Producer (factory) prices in the work wear industry rose at a much slower pace in 1982 than in 1981. The fastest growing category was work pants. The factory prices index rose 4.7% from the preceding year.

Producer Prices for Specified Work Wear, 1980-1982
(1967=100, unless otherwise indicated)

	Annual Averages			% Change	
	1982(p)	1981	1980	1982/1981	1982/1980
All items	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Men's & boys' wear	219.5	210.3	200.4	+ 4.1	+ 9.5
Men's washable service apparel*	99.6	na	na	na	na
Men's one-piece work suits*	98.7	na	na	na	na
Men's work pants	231.4	221.0	212.2	+ 4.7	+ 9.0
Men's dungarees & overalls**	145.1	144.5	130.1	+ 0.4	+ 11.5
Men's & boys' work gloves & mittens	292.7	290.8	267.0	+ 0.7	+ 9.6

*12/81 = 100
**1977 = 100
na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL SALES

The Census of Retail Trade, 1977 provides the only official information on sales by merchandise line in specific types of stores with payrolls. In 1977, department stores accounted for over 56% of the total reported work wear sales amounting to $989.2 million that year. Men's & boys' wear stores and family clothing stores were both far behind department stores, each registering 19.2% of the market.

Reported Sales of Men's Career/Work Wear by Store Type, 1977
(Including Stores With Payrolls Only)

	Stores Reporting Sales		Sales	
	Number*	Percent	Mil. $	Percent
Total**	22,570	100.0%	$989.2	100.0%
Department stores***	5,924	26.2	559.2	56.5
Men's & boys' wear stores	5,442	24.1	190.4	19.2
Family clothing stores	7,573	33.5	189.8	19.2
Other (men's shoe stores & mail order houses)	3,640	16.2	49.8	5.1

*Each business location is reported separately as a store unit, regardless of whether or not the store is part of a multi-unit or chain operation.

**Total is based only on stores which reported sales of career/work wear. Not all store types broke out sales for this category. The above reflects sales in major outlet types.

***Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order houses data.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Family clothing stores had the largest percentage of their sales credited to the career/work wear category in 1977 (6.3%), according to the U.S. Census of Retail Trade. Department stores ranked second with 5.3%, while men's & boys' wear stores held third place with 3.0% in that same year.

Percent of Total Men's & Boys' Wear Sales Accounted For By Men's Career/Work Wear in Specified Store Types, 1977

	Men's & Boys' Wear Sales* (Million $)	% of Sales Accounted For By Men's Career/Work Wear
Department stores**	$10,574.9	5.3%
Men's & boys' wear stores	6,275.4	3.0
Family clothing stores	3,001.5	6.3

*Excludes men's & boys' footwear sales.

**Includes discount department stores as well as traditional department stores. See footnote in table above.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade RC77-L.

CONSUMER BUYING HABITS

Information on men's work shirts and work pants has been supplied by the NPD Textile and Apparel Index, a specialized service of NPD Research, Inc., Port Washington, N.Y. They are based on the findings from an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. (Note that "singles" with their own households are not included. The data includes purchases made for men 17 years of age and over.)

Percent of Purchases by Store Type, 7/81-6/82

	Work Shirts		Work Pants	
	% of Units	% of Dollars	% of Units	% of Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Department stores	9.0	10.2	15.8	16.9
National chains	50.3	54.7	45.6	46.3
Discount stores, incl. K mart	27.2	20.8	23.2	21.3
Men's specialty stores	4.0	4.6	6.2	7.0
Other outlets	2.8	2.8	4.8	4.1
Not reported	6.7	6.9	4.4	4.4

Percent of Purchases by Price Point, 7/81-6/82

	Work Shirts	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $5.00	27.3	11.9
$5.00 - $8.99	41.4	38.3
$9.00 - $12.99	23.6	33.5
$13.00 & over	7.7	16.3

	Work Pants	
	% of Units	% of Dollars
Total purchases	100.0%	100.0%
Less than $8.00	10.4	4.3
$8.00-$13.99	53.6	44.4
$14.00 - $19.99	25.7	30.6
$20.00 & over	10.3	20.7

Source for the above tables: NPD Research.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments. (April)

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (May)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (May)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C 3400-1.49 (4)(a)

FAIRCHILD

Fashion Accessories (Men's and Women's)

FACT FILE

Market Research Division
Fairchild Publications, New York

BEST AVAILABLE COPY

Fashion Accessories (Men's and Women's)

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Jeffrey Clwell, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS.......... 1
GENERAL STATISTICS ON THE INDUSTRY.......... 1
  EMPLOYMENT & EARNINGS.......... 5
  CONCENTRATION IN THE INDUSTRY.......... 8
  LOCATION OF THE INDUSTRY.......... 10
SHIPMENTS.......... 12
  JEWELRY.......... 15
  HANDBAGS & PURSES.......... 17
  SMALL PERSONAL LEATHER GOODS.......... 17
  LUGGAGE.......... 18
  GLOVES.......... 18
  OTHER ACCESSORIES.......... 19
  BY LEADING STATES.......... 20
  BY LEADING MANUFACTURERS.......... 22
PRODUCER PRICE INDEX.......... 22
FOREIGN TRADE.......... 23
  IMPORTS.......... 24
  EXPORTS.......... 29

AT THE RETAIL LEVEL:

THE SIZE OF THE POTENTIAL MARKET.......... 31
  WORKING WOMEN.......... 32
THE BRIDAL MARKET.......... 33
RETAIL SALES.......... 34
  BY TYPE OF RETAIL OUTLET.......... 35
RETAIL OPERATING RATIOS.......... 39
RETAIL SALES BY MONTH.......... 42
RETAIL ADVERTISING.......... 42
CONSUMER BUYING HABITS.......... 43

SCHEDULE OF ADDITIONAL FACT FILES.......... 45

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications
Division of Capital Cities Media, Inc.
All Rights Reserved.
Standard Book Number: 87005-456-2
Printed in the United States of America

FASHION ACCESSORIES

Market Trends

At the outset of 1983, the nation's economy seemed ready to recover from its economic doldrums. During this recessionary period, accessories sales suffered less than other types of apparel as consumers continued to buy these products to accent existing wardrobes without making a major outlay. According to some retail analysts this trend will hold up, at least for the first year of the recovery, because sales of other apparel items will be slowed due to pent-up demand for big-ticket durable goods. Nevertheless, apparel sales are expected to grow about 2.5% in 1983 and an even larger percentage in 1984.

Retail sales of women's accessories are estimated at over $7 million. Dollar volume in men's and boys' accessories is not available; however, a report by the NPD Textiles and Apparel Market Index based on their consumer panel data for the year 1982 showed a 2.3% rise in men's and boys' accessories sales compared with the previous year. In this same period, overall sales of men's and boys' wear increased only 1.1% compared with 1981.

Fashionable styling and colors are the essential ingredients which entice accessory purchases. In women's accessory looks for 1983, bi-color combinations, such as pink, purple, sea green, yellow and brick--often paired with black--are the dominant look. Men's accessories will also employ distinctive styles and colorations to supplement the traditional accessory offerings.

Accessories cannot be defined in a single standard industry classification whose value or size is readily measured due to the large variety of products in the category. Some accessories, notably belts and trimmings such as buckles and the like, are sold either to other apparel manufacturers who use them as part of their finished garments, or at retail, further complicating an accessories retail sales report.

The distinction between items included in the men's furnishings category and in men's accessories is also subject to varying interpretations. Information on men's neckwear, hats and underwear is covered in detail in the Men's Furnishings & Work Wear Fact File and information on men's and women's hosiery is detailed in the Hosiery/Legwear Fact File.

At the Manufacturer Level

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census compiles a complete census of all manufacturers by industry classification every five years--the latest covering the year 1977, and in intercensal years conducts surveys among a representative sample of manufacturers to develop information on key measurements of activity. The most recent survey report is for the year 1980. Supplementing these sources is the U.S. Industrial Outlook, issued annually by the U.S. Bureau of Industrial Economics, which covers estimates on a limited number of industries in apparel and related classifications.

GENERAL INDUSTRY STATISTICS

Accessories manufacturers are part of many separate industry classifications under the Standard Industrial Classification system followed in government data. In some cases, accessories are combined with manufactures of other products (i.e., the Watch & Clock Industry).

	Costume Jewelry (SIC 3691*)			Precious Metal Jewelry (SIC 3911*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	837	na	na	2,165
Number of establishments, total**	708#	736#	847	1,973#	2,076#	2,206
Number with 20 or more employees	199	203	236	342	420	405
Employees, total (thous.)	23.4	22.4	25.0	36.9	40.8	42.1
Production workers (thous.)	17.7	18.3	17.6	25.3	28.6	29.2
Payroll (mil. $)	$249.4	$219.3	$215.9	$ 469.4	$ 478.2	$ 432.0
Value added by manufacture## (mil. $)	546.9	480.4	485.1	1,160.8	1,193.8	979.8
Value of industry shipments### (mil. $)	989.4	857.6	816.6	2,838.6	2,699.4	2,107.0
Capital expenditures, new (mil. $)	18.9	13.5	17.6	34.9	29.0	25.6

	Watches, Clocks (SIC 3873*)			Apparel Belts (SIC 2387*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	283	na	na	281
Number of establishments, total**	217#	242#	302	248#	242#	284
Number with 20 or more employees	102	107	112	132	115	119
Employees, total (thous.)	23.0	27.4	31.5	9.5	10.0	9.4
Production workers (thous.)	17.3	21.0	24.0	7.7	8.0	7.3
Payroll (mil. $)	$ 290.6	$ 309.3	$ 316.6	$ 102.5	$ 93.8	$ 76.1
Value added by manufacture## (mil. $)	663.5	672.2	684.5	235.7	213.9	150.1
Value of industry shipments### (mil.$)	1,511.6	1,592.0	1,594.7	422.4	388.4	286.9
Capital expenditures, new (mil. $)	17.6	23.6	23.2	1.6	2.9	2.5

	Fabric Dress & Work Gloves (SIC 2381*)			Leather Gloves (SIC 3151*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	100	na	na	84
Number of establishments, total**	115#	118#	132	93#	93#	101
Number with 20 or more employees	89	87	92	55	64	66
Employees, total (thous.)	9.6	11.3	10.9	6.1	6.2	5.5
Production workers (thous.)	8.7	10.4	9.9	5.3	5.5	4.7
Payroll (mil. $)	$ 64.0	$ 76.3	$ 69.0	$ 38.9	$ 38.6	$ 33.9
Value added by manufacture## (mil. $)	137.9	173.4	160.9	62.4	70.0	67.6
Value of industry shipments### (mil. $)	280.7	337.2	312.4	180.7	181.0	178.0
Capital expenditures, new (mil. $)	3.6	2.0	3.5	0.9	0.9	1.9

(continued)

GENERAL INDUSTRY STATISTICS

	Women's Handbags			Small Leather Goods		
	(SIC 3171*)			(SIC 3172*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	404	na	na	253
Number of establishments, total**	590#	363#	418	241#	240#	260
Number with 20 or more employees	162	181	186	92	90	97
Employees, total (thous.)	21.6	22.0	20.3	10.8	11.8	11.9
Production workers (thous.)	19.2	19.6	18.2	8.3	9.5	9.6
Payroll (mil. $)	$180.3	$164.0	$144.0	$100.9	$105.6	$ 98.2
Value added by manufacture## (mil. $)	303.9	304.3	266.5	247.8	241.5	205.8
Value of industry shipments### (mil. $)	573.4	579.3	505.2	406.3	400.9	366.8
Capital expenditures, new (mil. $)	5.5	4.6	6.6	1.9	3.6	4.8

	Luggage			Millinery		
	(SIC 3161*)			(SIC 2351*)		
	1980	1979	1977	1980	1979	1977
Number of companies	na	na	286	na	na	151
Number of establishments, total**	266#	276#	298	105#	108#	151
Number with 20 or more employees	127	132	130	44	46	47
Employees, total (thous.)	20.7	22.0	19.2	2.8	na	2.7
Production workers (thous.)	16.7	17.8	15.8	2.2	na	2.2
Payroll (mil. $)	$229.8	$224.5	$164.1	$20.8	na	$20.2
Value added by manufacture## (mil. $)	527.1	447.8	328.3	35.8	na	32.8
Value of industry shipments### (mil. $)	957.3	872.8	654.9	79.6	na	75.1
Capital expenditures, new (mil. $)	16.3	11.1	8.1	na	na	0.2

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made as shown below:

SIC 3961 covers manufacturers specializing in the production of costume jewelry, costume novelties and ornaments made of all materials except precious metal, etc.

SIC 3911 covers manufacturers specializing in the production of jewelry and other articles worn on or carried about the person, made of precious metals with or without stones, including cigarette cases and lighters, vanity cases and compacts; trimmings for umbrellas and canes; and jewel settings and mountings.

SIC 3873 covers manufacturers specializing in the production of clocks, watches, watchcases, mechanisms for clockwork-operated devices and clock and watch parts, as well as establishments primarily engaged in assembling clocks and watches from purchased movements and cases.

SIC 2387 covers manufacturers specializing in the production of men's and women's apparel belts, regardless of material.

(continued)

GENERAL INDUSTRY STATISTICS

SIC 2381 covers manufacturers specializing in the production of dress, semi-dress, and work gloves and mittens, cut and sewn from purchased woven or knit fabric, or these fabrics combined with leather or plastic.

SIC 3151 covers manufacturers specializing in the production of dress, semi-dress, and work gloves exclusively of leather or leather with lining of other material.

SIC 3171 covers manufacturers specializing in the production of women's handbags and purses of leather or other materials, except precious metals.

SIC 3172 covers manufacturers specializing in the production of small articles, such as billfolds, key cases, and coin purses of leather or other materials, except precious metals.

SIC 3161 covers manufacturers specializing in the production of luggage of leather or other material.

SIC 2351 covers manufacturers specializing in the production of women's, misses', childrens' and infants' millinery.

**Each business location is counted as a separate establishment.

#Includes only establishments with payrolls. This information is from County Business Patterns (U.S. Census Bureau).

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). Available data on the total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) are covered in the value of shipments reported on pages 13 and 14.

Source: U.S. Bureau of the Census, Census of
Manufactures, 1977; Annual Surveys of
Manufactures, 1979, 1980.

GENERAL INDUSTRY STATISTICS

Estimates on industry shipments for 1981 and 1982, and in some cases for 1983, have been compiled by the U.S. Bureau of Industrial Economics, as noted below.

Estimated Value of Industry Shipments
(Millions of Dollars)

Reported Industries	Current Dollars 1983	Current Dollars 1982	Current Dollars 1981	Constant (1972) Dollars 1983	Constant (1972) Dollars 1982	Constant (1972) Dollars 1981	Compound Annual Rate of Growth 1972-82
Jewelry industries							
Precious metal	$2,950	$2,900	$2,870	nr	nr	nr	+ 9.9%
Costume	1,070	1,050	1,030	nr	nr	nr	+ 8.3
Leather glove industry	nr	167	182	57	59	65	- 4.9
Luggage industry	nr	963	1,024	480	485	516	+ 2.9
Handbag industry	nr	456	518	279	288	320	- 2.3
Small leather goods ind.	nr	393	418	231	238	259	- 0.2

nr = not reported

Source: U.S. Bureau of Industrial Economics,
1983 U.S. Industrial Outlook.

Employment & Earnings

In the first ten months of 1982 the level of employment in those accessories industries covered in U.S. Bureau of Labor Statistics data showed a decline compared with the same 1981 period, with the exception of the precious metals jewelry industry. This is a continuance of the long-term trend in declining employment in domestic accessories industries which have been unable to compete against imports.

Average weekly earnings and hours have, on the other hand, continued to show gains.

Employment & Earnings in Specified Accessories Industries, 1980, 1981
& January-October 1981, 1982

	January-October 1982	January-October 1981	Annual Averages 1981	Annual Averages 1980	Annual Averages % Change 1981/1980
Costume jewelry (SIC 3961)					
All employees (thous.)	21.8	23.7	24.0	25.2	- 4.8%
Production workers (thous.)	16.9	18.3	18.5	19.8	- 6.6
Avg. weekly earnings	$194.00	$180.49	$181.34	$165.84	+ 9.3
Avg. weekly hours	38.2	37.6	37.7	37.1	+ 1.6
Precious metals jewelry (SIC 3911)					
All employees (thous.)	36.9	36.8	37.3	37.2	+ 0.3
Production workers (thous.)	25.9	25.8	26.2	26.3	- 0.4
Avg. weekly earnings	$254.13	$241.00	$246.35	$214.13	+ 15.0
Avg. weekly hours	37.0	37.4	37.9	37.5	+ 1.1

(continued)

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in Specified Accessories Industries, 1980, 1981 & January-October 1981, 1982
(continued)

	January-October		Annual Averages		
	1982	1981	1981	1980	% Change 1981/1980
Women's handbags & personal leather goods (SIC 317)					
All employees (thous.)	27.1	30.1	30.1	30.0	+ 0.3%
Production workers (thous.)	22.1	25.0	24.9	25.4	- 2.0
Avg. weekly earnings	$177.05	$169.09	$170.72	$155.45	+ 9.8
Avg. weekly hours	36.1	36.2	36.4	35.9	+ 1.4
Watches, clocks & watchcases (SIC 387)					
All employees (thous.)	18.0	20.3	20.1	22.3	- 9.9
Production workers (thous.)	12.6	14.9	14.7	16.7	- 12.0
Avg. weekly earnings	$236.17	$222.52	$223.29	$202.26	+ 10.4
Avg. weekly hours	38.6	38.9	38.9	38.6	+ 0.8
Luggage (SIC 316)					
All employees (thous.)	13.3	15.1	15.0	16.3	- 8.0
Production workers (thous.)	9.9	11.5	11.4	12.2	- 6.6
Avg. weekly earnings	$197.67	$193.42	$194.11	$178.36	+ 8.8
Avg. weekly hours	34.7	37.7	37.4	36.4	+ 2.7

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Employment Size

Number of Accessory Manufacturing Establishments by Employment Size, 1980

	Costume Jewelry (SIC 3961)		Precious Metal Jewelry (SIC 3911)	
	No.	% of Total	No.	% of Total
Total establishments*	708	100.0%	1,973	100.0%
Employment size:				
Under 10 employees	404	57.1	1,303	66.0
10-49 employees	213	30.1	527	26.7
50-249 employees	75	10.6	124	6.3
250 or more employees	16	2.3	19	1.0

(continued)

GENERAL INDUSTRY STATISTICS

Employment Size

Number of Accessory Manufacturing Establishments by Employment Size, 1980 (continued)

	Watches, Clocks & Watchcases (SIC 387)		Apparel Belts (SIC 2387)		Fabric Dress & Work Gloves (SIC 2381)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	217	100.0%	248	100.0%	115	100.0%
Employment size:						
Under 10 employees	85	39.2	77	31.0	16	13.9
10-49 employees	72	33.2	111	44.8	42	36.5
50-249 employees	33	15.2	57	23.0	48	41.7
250 or more employees	27	12.4	3	1.2	9	7.8

	Leather Gloves (SIC 3151)		Women's Handbags (SIC 3171)		Small Leather Goods (SIC 3172)	
	No.	% of Total	No.	% of Total	No.	% of Total
Total establishments*	93	100.0%	344	100.0%	241	100.0%
Employment size:						
Under 10 employees	25	26.9	118	34.3	109	45.2
10-49 employees	36	38.7	140	40.7	78	32.4
50-249 employees	32	34.4	67	19.5	46	19.1
250 or more employees	--	--	19	5.5	8	3.3

	Luggage (SIC 3161)		Millinery (SIC 2351)	
	No.	% of Total	No.	% of Total
Total establishments*	266	100.0%	105	100.0%
Employment size:				
Under 10 employees	82	30.8	41	39.0
10-49 employees	104	39.1	50	47.6
50-249 employees	67	25.2	13	12.4
250 or more employees	13	4.9	1	0.9

*Includes only establishments with payrolls.

Source: U.S. Bureau of the Census,
County Business Patterns 1980.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios of the Leading Manufacturers In Specified Accessories Industries, 1977

	No. of Companies	Value of Industry Shipments (Mil. $)	New Capital Expenditures (Mil. $)	Value Added by Manufacture (Mil. $)
Precious metal jewelry (SIC 3911)	2,165	$ 2,107.0	$ 25.6	$ 979.8
Percent accounted for by:				
4 largest companies	0.2%	18.1%	16.4%	18.2%
8 largest companies	0.4	24.0	22.9	25.1
20 largest companies	1.0	34.6	28.9	35.7
50 largest companies	2.4	48.2	49.4	48.8
Costume jewelry (SIC 3961)	837	$ 816.6	$ 17.6	$ 485.1
Percent accounted for by:				
4 largest companies	0.5%	23.3%	10.5%	25.5%
8 largest companies	1.0	32.5	15.3	34.8
20 largest companies	2.4	47.3	40.8	49.8
50 largest companies	6.0	63.2	73.6	64.7
Watches, clocks & watchcases (SIC 3873)	283	$ 1,594.7	$ 23.2	$ 684.5
Percent accounted for by:				
4 largest companies	1.4%	58.1%	44.8%	52.1%
8 largest companies	2.8	64.2	52.7	61.0
20 largest companies	7.0	79.6	84.7	80.1
50 largest companies	17.6	91.6	92.6	92.8
Women's handbags (SIC 3171)	404	$ 505.2	$ 6.6	$ 266.5
Percent accounted for by:				
4 largest companies	1.0%	21.4%	30.8%	18.5%
8 largest companies	2.0	30.8		26.8
20 largest companies	5.0	48.1	45.8	45.1
50 largest companies	12.4	70.4	64.2	67.6
Personal leather goods (SIC 3172)	253	$ 366.8	$ 4.8	$ 205.8
Percent accounted for by:				
4 largest companies	1.6%	38.3%	35.4%	38.9%
8 largest companies	3.2	49.4	na	50.5
20 largest companies	7.9	66.9	64.6	65.7
50 largest companies	19.8	85.7	90.9	85.4

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios of the Leading Manufacturers In Specified Accessories Industries, 1977
(continued)

	No. of Companies	Value of Industry Shipments (Mil. $)	New Capital Expenditures (Mil. $)	Value Added by Manufacture (Mil. $)
Fabric dress & work gloves (SIC 2381)	100	$ 312.4	$ 3.5	$ 160.9
Percent accounted for by:				
4 largest companies	4.0%	44.5%	na	46.7%
8 largest companies	8.0	63.1	na	65.1
20 largest companies	20.0	82.4	na	83.5
50 largest companies	50.0	95.8	na	96.1
Leather gloves & mittens (SIC 3151)	84	$ 178.0	$ 1.9	$ 67.6
Percent accounted for by:				
4 largest companies	4.8%	38.2%	10.7%	29.5%
8 largest companies	9.6	53.9	20.8	47.0
20 largest companies	23.9	78.7	43.8	72.7
50 largest companies	59.6	96.9	98.2	96.2
Luggage (SIC 3161)	286	$ 654.9	$ 8.1	$ 328.3
Percent accounted for by:				
4 largest companies	1.4%	39.5%	40.8%	36.7%
8 largest companies	2.8	49.9	57.3	47.8
20 largest companies	7.0	65.9	65.8	63.2
50 largest companies	17.5	84.6	85.4	83.6
Apparel belts (SIC 2387)	281	$ 286.9	$ 2.5	$ 150.3
Percent accounted for by:				
4 largest companies	1.4%	20.8%	14.7%	22.8%
8 largest companies	2.8	32.3	24.1	33.3
20 largest companies	7.1	51.0	46.0	49.4
50 largest companies	17.8	71.0	69.5	69.7
Millinery (SIC 2351)	151	$ 75.1	$ 0.2	$ 32.8
Percent accounted for by:				
4 largest companies	2.6%	18.7%	8.2%	11.9%
8 largest companies	5.2	27.8	20.0	24.4
20 largest companies	13.1	48.2	46.5	45.9
50 largest companies	33.0	78.8	77.7	78.2

na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9

GENERAL INDUSTRY STATISTICS

Location of the Industry

Rhode Island manufacturing plants produced more than half of the total U.S. value of costume jewelry shipments in 1977. Plants in New York State accounted for 50% of the total shipment value of U.S.-made handbags and purses, 42% of precious metal jewelry shipments in dollars and a third of the shipment value of apparel belts in 1977.

Leading States in the Manufacture of Specified Accessories, 1977

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Costume jewelry (SIC 3961)				
Leading states:				
Rhode Island	315	119	$ 248.8	$ 428.4
New York	207	52	66.2	115.2
California	86	18	24.7	36.9
Massachusetts	49	17	70.4	114.0
Connecticut	12	5	41.5	65.9
U.S. total	847	236	485.1	816.6
Leading states, total	669	211	451.6	760.4
Percent of U.S. total	79%	89%	93%	93%
Precious metal jewelry (SIC 3911)				
Leading states:				
New York	759	171	346.0	893.2
Rhode Island	295	69	190.1	370.2
California	254	25	67.0	122.6
Massachusetts	76	25	90.6	162.4
New Jersey	66	20	54.8	114.5
Texas	58	12	49.4	83.4
U.S. total	2,206	405	979.8	2,107.0
Leading states, total	1,508	322	797.9	1,746.3
Percent of U.S. total	68%	79%	81%	83%
Watches, clocks & watchcases (SIC 3873)				
Leading states:				
New York	71	30	110.3	255.6
California	52	7	18.4	36.2
New Jersey	21	10	18.2	34.5
Illinois	18	7	63.8	139.4
Michigan	16	8	35.7	70.3
Pennsylvania	12	8	16.5	43.6
U.S. total	303	113	685.6	1,597.8
Leading states, total	190	70	262.9	579.6
Percent of U.S. total	63%	62%	38%	36%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1977
(continued)

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Women's handbags & purses (SIC 3171)				
Leading states:				
New York	195	100	$ 130.7	$ 254.7
California	53	17	21.6	38.7
New Jersey	21	12	33.1	61.0
Texas	17	7	7.8	16.1
Massachusetts	15	6	7.4	12.9
Connecticut	7	6	11.7	23.8
U.S. total	418	186	266.5	505.2
Leading states, total	308	148	212.3	407.2
Percent of U.S. total	74%	80%	80%	81%
Personal leather goods (SIC 3172)				
Leading states:				
New York	79	39	46.9	95.6
California	34	4	5.3	11.7
Massachusetts	23	8	31.0	49.8
New Jersey	13	8	17.0	26.5
U.S. total	260	97	205.8	366.8
Leading states, total	149	59	100.2	183.6
Percent of U.S. total	57%	61%	49%	50%
Leather gloves & mittens (SIC 3151)				
Leading states:				
New York	30	16	15.3	50.8
Wisconsin	18	13	10.4	20.6
Illinois	9	7	5.4	14.9
Texas	4	4	6.3	12.8
U.S. total	101	66	67.6	178.0
Leading states, total	61	40	37.4	99.1
Percent of U.S. total	60%	61%	55%	56%
Fabric dress & work gloves (SIC 2381)				
Leading states:				
North Carolina	14	13	27.2	59.2
Missouri	6	6	14.9	27.8
Alabama	3	3	11.3	21.7
Georgia	8	7	8.0	16.3
New York	21	7	6.4	12.3
Mississippi	11	10	na	na
U.S. total	132	92	160.9	312.4
Leading states, total*	52	36	67.8	137.3
Percent of U.S. total*	39%	39%	42%	44%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1977
(continued)

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Apparel belts (SIC 2387)				
Leading states:				
New York	142	55	$ 48.4	$ 95.0
California	42	9	13.0	21.2
Texas	15	13	17.9	29.6
Pennsylvania	12	6	7.4	14.0
Massachusetts	11	7	9.3	16.5
Connecticut	7	4	20.7	32.3
U.S. total	284	119	150.3	286.9
Leading states, total	229	94	116.7	208.6
Percent of U.S. total	81%	79%	78%	73%
Millinery (SIC 2351)				
Leading state:				
New York	95	26	19.9	46.0
U.S. total	151	47	32.8	75.1
Percent of U.S. total	63%	55%	61%	61%
Luggage (SIC 3161)				
Leading states:				
New York	75	39	60.8	114.9
California	36	12	19.0	37.7
Illinois	28	7	9.7	15.4
New Jersey	20	13	23.5	51.1
Pennsylvania	13	7	14.9	32.5
Tennessee	9	5	27.0	44.3
U.S. total	298	130	328.3	654.9
Leading states, total	181	83	154.9	295.9
Percent of U.S. total	61%	64%	47%	45%

*"Value Added by Manufacture" total and "Value of Shipments" total excludes figures from Mississippi plants.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

The complete census of manufactures which is conducted every five years by the U.S. Census Bureau (the most recent covering operations in 1977) provides the most detailed information available on U.S. manufactures of accessories items. However, even that source does not provide data in sufficient detail to cover all the many types of accessory items for men and for women.

SHIPMENTS

In intercensal years the U.S. Bureau of the Census compiles surveys among manufacturers to develop information on key manufacturing statistics. A limited number of accessory categories are covered in these surveys, the latest available of which is for the year 1980. Findings compared with 1977 census data are reported in the following table.

Summary of Value of Shipments
By All U.S. Producers of Specified Accessories, 1977, 1979, 1980

	Value of Shipments (Million $)		
	1980	1979	1977(r)
Specified accessories, total	--	--	$5,449.7
Jewelry, precious metal & costume jewelry	$5,481.0	$5,109.4	2,689.4
Precious metal jewelry	2,740.5	2,554.7	1,907.7
Platinum and karat gold jewelry	1,905.7	1,757.9	1,251.5
Other precious metal jewelry	528.6	531.2	353.0
Jewelry, n.s.k.	306.2	265.6	303.2
Costume jewelry	857.2	772.2	781.5
Watches	630.0	725.1	772.0
Watches with imported movements or modules	389.0	369.9	300.7
Watches with domestic movements or modules, clock cases & parts	241.0	355.2	471.3
Apparel belts*	362.4	340.1	244.3
Women's & children's	nr	nr	71.4
Men's & boys'	nr	nr	132.7
Other, n.s.k.	--	--	40.2
Dress & semi-dress gloves & mittens	63.7	68.1	56.3**
Leather	24.7	29.6	27.1
Fabric	12.7	13.0	9.5
Leather & fabric combination	16.5	14.9	8.8
Made in knitting mills	9.8	12.2	9.9
Small personal leather goods	426.4	407.0	369.2
Handbags & purses	501.0	491.3	436.2
Millinery	nr	nr	74.2
Luggage	808.1	728.7	585.3

(continued)

SHIPMENTS

Summary of Value of Shipments
By All U.S. Producers of Specified Accessories, 1977, 1979, 1980
(continued)

	Value of Shipments (Million $)		
	1980	1979	1977(r)
Other accessories	--	--	$ 222.8
Cotton handkerchiefs	nr	nr	27.0
Umbrellas, parasols & canes	nr	nr	36.0
Sun or glare glasses & sungoggles, ready-made	nr	nr	130.8
Women's, misses' & juniors' scarfs, dickies & neckwear	nr	nr	29.0

*Excludes belts made and sold as part of garments.
**Includes types not specified by kind.
(r) = revised
nr = not reported
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977; Annual Survey of Manufactures, 1979, 1980; Current Industrial Reports MA-23D (Gloves)

Estimates on total shipments of selected products are compiled annually by the U.S. Bureau of Industrial Economics. These figures cover shipments by all U.S. producers regardless of primary industry classification.

Measured in constant 1972 dollars, which eliminates the effects of inflation, the value of shipments of leather accessories--gloves, handbags, luggage and personal leather goods--fell about 8% in 1982 compared with 1981. On a current dollar basis, the value of shipments, which totaled $1.8 billion in 1982, was 7.5% below 1981. Further declines are expected in all sectors in 1983.

Imports are the major cause of the decline in shipments by U.S. manufacturers. All operations are highly labor-intensive and overseas production costs fall far below those within this country. The import-to-apparent consumption ratio for handbags was 52% in 1982; for luggage, 30%; for leather gloves and mittens, 27%; for personal leather goods, 27%.

The value of product shipments of precious metal and costume jewelry was expected to total $3.7 billion in 1982, just slightly higher than in 1981. With the downturn in the economy, consumer demand was weak despite lower gold and diamond prices, and there was also an increase in competition from imports, especially Italian jewelry.

SHIPMENTS

The precious jewelry industry is labor-intensive, employing highly skilled workers, and direct sales to retailers account for a substantial portion of manufacturers' sales. In contrast, the costume jewelry industry is less labor-intensive, and the largest share of costume jewelry is distributed to retailers through wholesalers.

Consumer resistance to purchasing higher priced jewelry--$400 and up--was expected to continue into early 1983 although this could change if the economy picks up at a faster-than-expected rate.

Estimated Value of Product Shipments (By All Producers)
(Millions of Dollars)

	Current Dollars			Constant (1972) Dollars			Compound Annual Rate of Growth
	1983	1982	1981	1983	1982	1981	1972-82
Jewelry							
Precious metal	$2,850	$2,800	$2,770	nr	nr	nr	+ 11.0%
Costume	925	910	895	nr	nr	nr	+ 7.5
Leather accessories	--	1,761	1,905	937	959	1,040	na
Leather gloves	nr	137	149	46	48	53	- 4.2
Luggage	nr	813	865	406	410	436	- 1.0
Handbags	nr	398	452	243	251	279	- 3.2
Small leather goods	nr	413	439	242	250	272	- 3.2

na = not available
nr = not reported

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook

Within the accessories classifications that are covered in government data it is necessary to go back to the 1977 Census of Manufactures Industry Reports for shipment information in any detail. Available details from this source are covered in the following tables.

Value of Shipments of Jewelry (By All U.S. Producers), 1977
(Millions of Dollars)

		% Change 1977/1972
Precious metal jewelry, total	$ 1,907.7	+ 94.3%
Jewelry made of platinum metals & karat gold	1,251.5	+ 90.6
Rings, complete	445.8	+ 24.5
Wedding rings	133.2	+ 22.0
Other rings	312.6	+ 25.6
Ring mountings	69.3	+ 1.9
Women's & children's jewelry such as necklaces, bracelets, brooches, pins, earrings, etc.	327.8	+146.3

(continued)

Value of Shipments of Jewelry (By All U.S. Producers), 1977
(Millions of Dollars)
(continued)

		% Change 1977/1972
Bracelets for watches	$ 31.4	+ 49.5%
Organizational jewelry	44.7	+ 73.9
Other, including men's, religious, cigarette cases, lighters, compacts, vanity cases, etc.	52.3	+ 20.5
Jewelry, not specified by kind	108.0	na
Jewelry made of gold filled, rolled goldplate & sterling silver	353.0	+ 97.7
Rings & ring mountings	35.3	- 10.6
Men's jewelry	33.0	+159.8
Women's & children's jewelry	184.3	+182.7
Bracelets for watches	38.1	+ 16.1
Other jewelry	38.1	+ 74.8
Jewelry, not specified by kind	24.1	na
Other jewelry not specified by kind	303.1	+106.7
Costume jewelry, total	781.5	+ 76.9
Base metal:		
Rings & ring mountings	567.5	+ 94.3
Men's jewelry, excluding watch attachments & rings	43.3	+ 50.3
Women's & children's jewelry & costume novelties	402.3	+165.4
Bracelets for watches & fraternal, college & school jewelry	43.2	- 26.3
Other jewelry, including religious	25.6	+ 9.9
Imitation pearls	14.3	+ 44.4
Compact & vanity cases	36.2	+133.5
Other costume jewelry made of plastics, wood, leather, etc.	42.0	+ 17.3
Costume jewelry, not specified by kind	121.4	+ 37.3

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

SHIPMENTS

Value of Shipments of Handbags & Purses By All U.S. Producers, 1977 (Millions of Dollars)

		% Change 1977/1972
Women's handbags & purses, total	$ 436.2	+ 26.6%
All leather & chiefly leather	109.4	+ 62.8
Plastics or chiefly plastics	154.6	- 21.5
Other materials, except precious metals	53.2	+ 90.7
Women's handbags & purses, n.s.k.	119.0	+127.1

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

Value of Shipments by All U.S. Producers of Small Personal Leather Goods, 1977 (Millions of Dollars)

		% Change 1977/1972
Personal leather goods, total	$ 369.2	+ 59.3%
Billfolds, wallets, French purses & clutches	136.0	+ 46.2
Leather	125.3	+ 58.8
Other than leather (plastic, fiber, etc.)	10.7	- 24.1
Travel kits (fitted & unfitted)	21.9	+108.6
Jewelry boxes & cases	47.1	+102.1
Other personal goods (key, cigarette, eyeglass & vanity cases, cosmetics bags, etc.)	97.9	+ 38.9
Leather	55.8	na
Other than leather (plastic, fiber, etc.)	42.1	na
Small leather goods, n.s.k.	66.3	+ 92.2

na = not available.
n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

The 1977 census data on luggage included information on both quantity and value of shipments, by type of luggage.

Quantity & Value of Shipments of Luggage
By All U.S. Producers, 1977

	Quantity		Value	
	Thous. Units	% Change 1977/1972	Mil. $	% Change 1977/1972
Luggage, total	na	na	$ 585.3	+ 81.8%
Women's hand luggage, all types except zippered	5,123	- 29.7%	107.2	+ 15.9
Soft side (lock construction)	1,946	+ 4.9	35.5	+ 23.7
Other (including hard side & fully or semi-molded)	3,177	- 41.5	71.7	+ 12.4
Men's hand luggage, all types except zippered	2,957	+ 15.1	65.8	+ 43.3
Molded (fully or semi-molded)	1,559	+ 12.2	35.7	+ 52.6
Other (including hard & soft side)	1,398	+ 18.6	30.1	+ 33.8
Men's & women's zippered hand luggage	9,917	+ 37.0	147.1	+164.6
Occupational luggage cases, sample cases, etc.	3,570	+ 42.6	32.5	+ 85.7
Trunks, hand trunks & lockers	1,620	+ 63.6	19.3	+127.1
Briefcases, envelopes, school bags	5,395	+236.3	27.8	+124.2
Attache cases	3,876	+ 87.7	58.3	+163.8
Other (musical instrument cases, etc.)	na	na	47.6	+ 80.3
Luggage, n.s.k.	na	na	79.7	+ 94.4

na = not available. n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977.

Gloves

Information on the quantity and value of leather and fabric gloves and mittens is collected annually by the Census Bureau as part of their Current Industrial Report series. The report is based on a sample of U.S. glove and mitten manufacturers. According to this source, shipments of dress and semidress gloves and mittens rose 7.1% in value in 1982 to $68.2 million. At a shipment value of $30.2 million, all leather gloves constituted almost half of the total shipment value. The quantity of dress and semidress gloves and mittens shipped in 1982 increased 3.8% to 3,183 thousand dozen pairs.

SHIPMENTS

Gloves

Quantity & Value of Shipments of Gloves & Mittens By All U.S. Producers, 1980, 1981

	Quantity (Thous. Doz.)			Value (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Dress & semidress gloves & mittens, total	3,183	3,065	+ 3.8%	$ 68.2	$ 63.7	+ 7.1%
By material:						
All knit fabric, seamless	636	693	- 8.2	8.5	9.8	- 13.3
Leather & fabric combination	226	272	- 16.9	15.7	16.5	- 4.8
All leather	365	281	+ 30.0	30.2	24.7	+ 22.3
All knit fabric, seamed & cut All woven fabric	1,778	1,641	+ 8.3	11.4	10.2	+ 11.8
Fabric dress & semidress gloves & mittens, n.s.k.	178	178	--	2.4	2.5	- 4.0

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Report,
Gloves & Mittens MA-23D(81)-1.

Belts

According to the Annual Survey of Manufactures, belt shipments reached $362.4 million in 1980, 6.6% above the 1979 shipment value of $340.1. Leather belts shipped during 1980 accounted for only 47% of the total shipment value.

Value of Shipments of Apparel Belts By All U.S. Producers, 1979, 1980

	Value of Shipments (Mil. $)		% Change
	1980	1979	1980/1970
Apparel belts, total	$ 362.4	$ 340.1	+ 6.6%
Leather belts	170.5	179.2	- 4.9
Belts, other than leather	150.8	128.2	+ 17.6
Apparel belts, n.s.k.	41.1	32.7	+ 25.7

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1980

Other Accessories

For other accessories not specifically mentioned in the previous sections, the most recent information on the quantity and value of shipments is provided by the 1977 Census of Manufactures.

SHIPMENTS

Other Accessories

Quantity & Value of Shipments of Specified Accessories By All U.S. Producers, 1977

	Quantity		Value	
	Thous. Units	% Change 1977/1972	Mil. $	% Change 1977/1972
Millinery, total	na	na	$ 74.2	+ 26.4%
Fur-felt & wool-felt millinery	2,580	+ 13.8%	12.5	+ 78.6
Fabric millinery, including ribbon & pile fabrics	5,952	+ 9.0	12.3	+ 7.9
All other millinery	1,680	- 46.6	14.7	+ 9.7
Millinery, n.s.k.	na	na	34.7	+ 29.0
Cotton handkerchiefs, except embroidered	77,616	- 58.5	27.0	- 3.6
Umbrellas, parasols & canes	na	na	36.0	- 4.8
Sun or glare glasses & sunglasses, ready made	na	na	130.8	+ 39.3
Women's, misses' & juniors' scarfs, dickies & other neckwear	22,992	na	29.0	na

na = not available.

Source: U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

By Leading States

Value of Shipments of Specified Accessories by Leading States, 1977

	Value of Shipments (Mil. $)	% of Total
Jewelry made of platinum metals & karat gold		
Leading states:		
New York	$ 608.2	48.6%
Massachusetts	105.6	8.4
Rhode Island	102.1	8.2
New Jersey	82.7	6.6
California	81.9	6.5
Leading states, total	980.5	78.3
U.S. total	1,251.5	100.0
Other jewelry made of precious metals		
Leading states:		
Rhode Island	191.0	54.1
New York	51.1	14.5

(continued)

SHIPMENTS

By Leading States

Value of Shipments of Specified Accessories by Leading States, 1977
(continued)

	Value of Shipments (Mil. $)	% of Total
Other jewelry made of precious metals (cont'd.)		
Massachusetts	$ 33.5	9.5%
New Mexico	14.8	4.2
California	9.5	2.7
Leading states, total	299.9	85.0
U.S. total	353.0	100.0
Watches with imported movements or modules		
Leading state:		
New York	152.1	43.1
U.S. total	353.0	100.0
Watches with domestic movements or modules		
Leading states:		
New York	29.5	6.3
California	12.1	2.6
Leading states, total	41.6	8.9
U.S. total	471.3	100.0
Leather belts		
Leading states:		
New York	32.2	20.7
Connecticut	23.3	15.0
Texas	21.0	13.5
California	10.3	6.6
Leading states, total	86.8	55.8
U.S. total	155.5	100.0
Belts, other than leather		
Leading state:		
New York	37.4	64.3
U.S. total	58.2	100.0
Fabric dress gloves & mittens (including leather and fabric combinations)		
Leading state:		
New York	7.9	30.3
U.S. total	26.1	100.0

Source: Based on U.S. Bureau of the Census, Census of Manufactures, 1977, Industry Series.

SHIPMENTS

By Leading Manufacturers

More than half of the total $1.2 billion shipment value of platinum metal or karat gold jewelry in 1977 was produced by the 50 largest domestic jewelry manufacturers. The 50 largest U.S. manufacturers of watches, clocks and watchcases accounted for 92% of the entire 1977 shipment value of $1.3 billion.

Value of Shipments of Specified Accessories Accounted For By the 50 Largest U.S. Manufacturers of Each Item, 1977

	Value of Shipments* (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Jewelry, precious metals	$ 1,907.7	13	19	30	44
Of platinum metals or karat gold	1,251.5	21	28	41	57
Other jewelry of precious metals	353.0	23	35	52	72
Watches, clocks & watchcases	1,332.0	51	59	76	91
Watches with imported movements	300.7	74	90	na	100
Watches with domestic movements & parts for watches & clocks	471.3	84	93	99	100
Apparel belts	244.3	19	29	45	67
Leather belts, sold separately	155.5	27	42	64	87
Other than leather	58.2	22	33	53	85
Other Accessory Items:					
Costume jewelry & novelties	781.5	17	26	41	58
Dress & work gloves & mittens, leather	121.9	33	44	66	92
Women's & children's handbags & purses	436.2	15	25	43	67
Personal leather goods	369.2	40	50	65	82
Millinery	74.2	19	28	48	78
Suitcases, briefcases, bags, musical instrument cases	585.3	41	51	66	82

* Value of shipments from all producers, regardless of industry classification.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing
MC77-SR-9

PRODUCER PRICE INDEX

Producer (factory) prices for all commodities increased 2.0% in 1982 compared with the previous year. Due to lower prices of gold and other precious metals, the producer price of most jewelry items declined. The most notable decline was for gold wedding rings, which fell 15.8% at the factory price level in 1982 and a combined 32.0% since 1980.

PRODUCER PRICE INDEX

Producer Price Index of Specified Accessories, 1980-1982
(December 1978 = 100 unless otherwise indicated)

	1982(p)	1981	1980	% Change 1982/1981	% Change 1982/1980
All commodities (1967=100)	299.3	293.4	268.8	+ 2.0%	+ 11.3%
Jewelry, platinum & karat gold	174.2	186.9	218.7	- 6.8	- 20.3
Ring, ladies', high fashion	170.1	169.9	196.2	+ 0.1	- 13.3
Ring, ladies', engagement, 14 karat gold	na	157.5	181.3	--	--
Ring, wedding, gold	203.8	242.2	299.8	-15.8	- 32.0
Earrings, 14 karat gold	174.2	182.3	205.3	- 4.4	- 15.1
Other precious metal jewelry	164.4	166.2	163.1	- 1.1	+ 0.8
Ring, ladies' & men's, sterling	191.2	203.8	206.2	- 6.2	- 7.3
Bracelet, ladies', gold filled	148.2	143.6	138.1	+ 3.2	+ 7.3
Costume jewelry	126.3	119.5	110.9	+ 5.7	+ 13.9
Ring, ladies', costume	104.7	100.3	106.3	+ 4.4	- 5.6
Earrings, children's, costume	130.7	128.6	117.9	+ 1.6	+ 10.9
Necklace, ladies', costume	na	114.4	na	--	--
Wristwatch, women's, imported movement (17 jewel/quartz) (1967=100)	204.9	219.0	179.3	- 6.4	+ 14.3
Wristwatch, men's imported movement (1967=100)	167.2	171.2	163.1	- 2.3	+ 2.5
Men's dress leather gloves (1967=100)	332.8	328.0	311.1	+ 1.5	+ 7.0
Luggage & small leather goods (1967=100)	200.9	193.6	172.8	+ 3.8	+ 16.3
Week-end case, women's, non-leather (1967=100)	na	223.8*	198.7	--	--
Attache case, non-leather (1967=100)	199.9	187.5	182.3	+ 6.6	+ 9.6

(p) = preliminary
*January-September 1981 average.
na = not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

As previously noted in the section on SHIPMENTS, much of the decline in U.S. accessories manufacturing has been due to the inroads made by imports. U.S. producers are unable to compete on a cost basis. In the entire luggage and personal leather goods sector, according to the Department of Commerce, the import-to-apparent consumption ratio was over 40% in 1982, up 10% in the past five years. For handbags, the ratio was 52%; for luggage, 30%; for leather gloves, 27%; for personal leather goods, 27%.

FOREIGN TRADE

It was pointed out in the Department of Commerce report that two industries in the group, luggage and personal leather goods, had achieved some real growth through the 1970's but have declined in real terms since 1980 because of their loss in market to imports. With the exception of handbags from Italy, most U.S. handbag imports carry low unit prices and are made chiefly of materials other than leather. These imports come mainly from Taiwan, Hong Kong, Korea and China, where labor is cheap.

In jewelry, imports into the U.S. represented 21.7% of apparent consumption of precious metal jewelry in 1982, and 18.8% of costume jewelry. Exports, on the other hand, accounted for 5.7% of U.S. precious metal jewelry shipments, 7.5% of costume jewelry shipments.

According to the U.S. Bureau of Industrial Economics, costume jewelry imports were slightly higher in 1982, reaching $195 million, but had gained 13% in 1981 over 1980. Costume jewelry manufacturers and retailers imported an increasing share of their stocks, and Taiwan, Hong Kong, Korea, and Japan accounted for three-fourths of all U.S. imports of costume jewelry. U.S. exports amounted to an estimated $68 million in 1982, about 10% less than in 1981.

Following a 28% increase in 1981, precious jewelry imports rose an estimated 6% in 1982 reaching $730 million. Italy is the world's largest manufacturer and exporter of precious jewelry and controls more than half of all U.S. imports. Another 30% originates in Hong Kong, Switzerland and Israel. Meanwhile, U.S. exports of precious jewelry declined 30% in 1981, a decline partially reflecting lower gold and gem prices.

Detailed information on imports and exports of specified types of accessories items, as compiled in U.S. Census Bureau data, are reported in the following tables.

Imports

Summary of U.S. Imports of Specified Accessories,
January - September 1981, 1982
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Jewelry & religious articles, total	nr	nr	--	$691.8	$584.0	+ 18.5%
Watches & watchcases, total	57,361.5	50,757.4	+ 13.0%	498.4	584.8	- 14.8
Watch movements, total	9,875.8	9,942.4	- 0.7	46.7	67.6	- 30.9
Watch bracelets, total	2,544.8	2,624.9	- 3.0	34.1	38.6	- 11.7
Handbags, reported separately, total	121,191.7	114,590.3	+ 5.8	333.5	300.3	+ 11.0
Handbags & luggage, reported together, total	4,488.5	9,610.7	- 53.3	14.8	23.1	- 35.9
Handbags, flat goods & luggage reported together, total	nr	nr	--	5.0	4.3	+ 16.3

(continued)

FOREIGN TRADE

Imports

Summary of U.S. Imports of Specified Accessories, January - September 1981, 1982
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Luggage, reported separately, total	nr	nr	--	$270.1	$234.7	+ 15.0%
Flat goods, reported separately, total	nr	nr	--	70.8	66.3	+ 6.8
Gloves & glove linings, total (thous. doz. pairs)	22,203.2	21,223.0	+ 4.6%	145.1	139.6	+ 3.9
Gloves, horse or cowhide	3,574.9	3,662.7	- 2.4	57.2	59.1	- 3.2
Gloves, of leather, nspf	206.3	195.0	+ 5.8	10.7	10.2	+ 4.9
Other gloves & glove linings	18,422.0	17,365.3	+ 6.1	77.2	70.3	+ 9.8
Mufflers, scarfs & shawls, etc.	nr	nr	--	16.2	26.6	- 39.1
Handkerchiefs, total (thous. doz.)	2,573.2	4,000.3	- 35.7	8.9	13.5	- 34.1
Headwear, total	nr	nr	--	96.8	105.8	- 8.5
Leather belts	nr	nr	--	26.9	26.0	+ 3.5
Umbrellas	22,691.1	20,556.9	+ 10.4	38.7	34.8	+ 11.2

nr = not reported. nspf = not specially provided for.

* The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
September 1981, 1982.

Imports of watches (excluding watchcases) were valued at $778.4 million in 1981. The bulk of imported watches contained movements of fewer than eight jewels (83.4% of total import value). In terms of quantity, 66.4 million watches were shipped to the U.S. in 1981, 63.7 million with at most a seven jewel movement. Watchcase imports declined 13.1% in value to $23.3 million from $26.8 million in 1980 as the quantity imported fell 43.4% to 6.0 million. One hundred million dollars' worth of watch movements were imported in 1981, more than double the 1980 value.

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Jewelry & religious articles, total	nr	nr	--	$903.5	$693.3	+ 30.3%
Nonprecious metal jewelry	nr	nr	--	144.8	121.8	+ 18.9
Precious metal jewelry, set or unset	nr	nr	--	684.0	525.3	+ 19.6
Precious stones & pearls	nr	nr	--	74.7	46.2	+ 61.7
Watches & watchcases, total	72,425.8	63,133.9	+ 14.7%	801.7	711.6	+ 12.7
Not over 7 jewels	63,710.1	49,065.7	+ 29.8	649.5	537.0	+ 20.9
8-17 jewels	2,531.8	3,274.2	- 22.7	88.7	102.5	- 13.5
Over 17 jewels	138.5	119.6	+ 15.8	39.9	45.3	- 11.9
Watchcases	6,045.4	10,674.4	- 43.4	23.3	26.8	- 13.1
Watch movements, total	17,367.8	7,829.2	+121.8	100.0	47.9	+108.8
Not over 1 jewel	15,396.8	5,567.1	+176.6	76.3	16.1	+373.9
2-7 jewels	1,545.5	1,114.0	+ 38.7	17.5	16.1	+ 8.7
8-15 jewels	25.2	53.8	- 53.2	0.8	0.8	--
16-17 jewels	390.3	1,080.3	- 63.9	4.6	13.4	65.7
Over 17 jewels	10.0	14.0	- 28.6	0.8	1.5	- 46.7
Watch bracelets of nonprecious materials, total (thous. doz.)	3,817.1	3,363.5	+ 13.5	54.6	53.9	+ 1.3
Handbags (separately reported)	161,237.2	139,144.4	+ 15.9	429.7	372.9	+ 15.2
Nonreptile leather	21,105.2	17,956.6	+ 17.5	165.7	143.2	+ 15.7
Plastic, (other than reinforced or laminated plastic), nspf	44,530.3	48,217.0	- 7.6	99.5	101.8	- 2.3
Textile material, nspf	88,013.1	67,493.4	+ 30.4	150.3	115.8	+ 29.8
Beads, imitation gemstones, etc.	1,056.9	1,035.6	+ 2.0	2.1	1.6	+ 31.2
Paper yarns	37.2	55.0	- 32.4	0.1	0.3	- 66.7
Materials, nspf	6,494.5	4,386.8	+ 48.0	12.0	10.2	+ 17.6
Handbags & luggage (reported together), total	11,644.8	6,343.4	+ 83.6	33.6	18.2	+ 84.6
Reptile leather	249.3	117.1	+112.9	6.9	3.4	+102.9
Willow & similar unspun fibrous vegetable fibers	11,395.5	6,226.3	+ 83.0	26.7	14.8	+ 80.4
Handbags, flat goods & luggage (reported together), total	nr	nr	--	6.0	6.5	- 7.7
Reinforced or laminated plastic (thous. pounds)	408.2	704.6	- 42.1	1.6	2.6	- 38.5
Textile material, in part braid or handloomed	nr	nr	--	4.3	3.9	+ 10.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1980, 1981

(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Luggage (separately reported), total	nr	nr	--	$326.0	$271.1	+ 20.2%
Nonreptile leather	nr	nr	--	34.3	28.5	+ 20.4
Textile material, nspf	nr	nr	--	106.9	72.8	+ 46.8
Materials, nspf	nr	nr	--	184.8	169.8	+ 8.8
Flat goods (billfolds, key cases, etc.) (separately reported), total	nr	nr	--	96.0	81.4	+ 17.9
Leather, nspf	nr	nr	--	46.1	34.6	+ 33.2
Textile materials, nspf	nr	nr	--	26.5	17.9	+ 48.0
Materials, nspf	nr	nr	--	23.4	28.9	- 19.0
Gloves & glove linings, total	21,858.8	21,032.6	+ 3.9	173.8	176.8	- 1.7
Gloves, horse or cowhide, total (thous. dozen pairs)	4,878.2	5,102.8	- 4.4	80.5	89.0	- 9.5
All leather	1,414.7	1,581.6	- 10.5	35.8	40.9	- 12.5
Not wholly leather	3,463.5	3,521.2	- 1.6	44.7	48.1	- 7.1
Gloves, of leather, nspf, total (thous. dozen pairs)	267.6	307.1	- 12.9	15.1	18.1	- 16.6
Men's	106.5	127.7	- 16.6	5.1	6.4	- 20.3
Lined	60.2	87.8	- 31.4	3.2	4.6	- 30.4
Not lined	46.3	39.9	+ 16.0	1.9	1.8	+ 5.5
Women's or children's	161.1	179.4	- 10.2	10.0	11.7	- 14.5
Lined	149.0	166.0	- 10.2	9.3	10.8	- 13.9
Not lined	12.1	13.4	- 9.7	0.7	0.9	- 22.2
Other gloves & glove linings, (thous. dozen pairs)	16,713.1	15,622.7	+ 7.0	78.2	69.7	+ 12.2
Knit	8,143.5	6,247.2	+ 30.3	27.4	19.8	+ 38.4
Cotton	6,874.7	5,089.1	+ 35.1	17.7	11.5	+ 53.9
Textile materials, nspf	253.7	142.1	+ 78.5	5.7	3.1	+ 83.9
Man-made fibers	1,015.1	1,016.0	- 0.1	4.0	4.2	- 4.8
Not knit	8,569.6	9,375.5	- 8.6	50.8	49.9	+ 1.8
Man-made fibers	2,454.8	2,760.8	- 11.1	29.2	29.2	--
Other textile materials	6,114.8	6,614.7	- 7.6	21.6	20.7	+ 4.3

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Mufflers, scarfs & shawls, etc., not knit, total	20,160.4	20,978.8	- 3.9%	$ 35.2	$ 31.1	+ 13.2%
Cotton	276.3	164.8	+ 67.7	0.6	0.3	+100.0
Vegetable fibers, not cotton	0.9	11.4	- 92.1	**	**	--
Wool	2,992.9	2,615.3	+ 14.4	7.8	7.1	+ 9.9
Silk, not ornamented	3,173.1	2,644.2	+ 20.0	13.3	11.0	+ 20.9
Man-made fibers	13,705.5	15,534.6	- 11.8	12.8	12.2	+ 4.9
Textile materials (thous. pounds)	11.7	8.5	+ 37.6	0.7	0.5	+ 40.0
Handkerchiefs, total (thous. doz.)	4,991.3	3,929.3	+ 27.0	17.4	14.9	+ 16.8
Cotton	4,208.6	3,357.1	+ 25.4	11.1	8.8	+ 26.1
Silk	157.8	141.3	+111.7	2.9	2.8	+ 3.6
Vegetable fibers, not cotton	124.0	112.8	+ 9.9	1.0	0.9	+ 11.1
Textile materials	500.9	318.1	+ 57.5	2.4	2.4	--
Headwear, total	nr	nr	--	136.2	104.8	+ 30.0
Vegetable material, paper & man-made fibers, nspf	nr	nr	--	44.8	34.4	+ 30.2
Wool, except felt	2,159.1	2,050.4	+ 5.3	6.3	5.6	+ 12.5
Textile material, except wool, nspf	nr	nr	--	45.4	37.8	+ 20.1
Fur not on the skin, men's & boys'	836.1	357.7	+133.7	12.6	5.4	+133.3
Felt & fur not on the skin	nr	nr	--	3.7	3.6	+ 2.8
Headband & reinforced plastic headwear or hardhats, nspf	nr	nr	--	23.4	18.0	+ 30.0
Leather belts, total	nr	nr	--	36.8	36.8	--
Umbrellas	29,384.4	34,275.5	- 14.3	48.7	56.0	- 13.0

nspf = not specially provided for

* The c.i.f. value is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

** Less than $0.1 million.

Source: U.S. Bureau of the Census, U.S. General Imports, FT 135, December 1980, 1981.

FOREIGN TRADE

Exports

U.S. exports of jewelry slid 20.8% in value to $222 million in 1981 compared with $280.2 million the prior year. Exports of gold or platinum jewelry declined 34.2%, the largest drop registered among the jewelry categories, to $51.1 million. Costume jewelry exports were valued at $76.1 million, a gain of 6.4% over the 1980 value.

Other accessories exports rose in value compared with 1980. Watch exports increased 21.3%, handbags, 29% (including a 60% hike in leather handbag exports), leather belts, 23.3%, small personal goods, 8.3%, headwear, 7.9% and glove and glove linings, 3.8%. Handkerchiefs (-42.9%), mufflers and scarves (-12.5%) and luggage (-11.5%) exports decreased in value from 1980 levels.

U.S. Exports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Jewelry, total	nr	nr	--	$222.0	$280.2	- 20.8%
Not precious or semiprecious	nr	nr	--	76.1	71.5	+ 6.4
Platinum or gold, set or unset	nr	nr	--	51.1	77.7	- 34.2
Rolled precious metal or sterling silver, set or unset	nr	nr	--	16.4	18.8	- 12.8
Precious stones or natural pearls	nr	nr	--	73.0	107.3	- 32.0
Cultured pearls or semiprecious stones	nr	nr	--	5.4	4.9	+ 10.2
Watches, watchcases & watch movements, total	nr	nr	--	56.9	46.9	+ 21.3
Watches	999.5	920.5	+ 8.6%	19.6	17.6	+ 11.4
Watch movements	7,743.0	5,766.4	+ 34.3	7.3	4.5	+ 62.2
Watch cases & parts thereof	nr	nr	--	30.0	24.8	+ 21.0
Handbags, total	7,581.4	4,227.0	+ 79.4	20.0	15.5	+ 29.0
Leather	381.8	197.9	+ 92.9	4.0	2.5	+ 60.0
Plastics	6,113.7	2,956.9	+106.8	6.6	4.9	+ 34.7
All other materials	1,085.9	1,072.2	+ 1.3	9.4	8.1	+ 16.0
Flat goods (billfolds, key cases, etc.), total	nr	nr	--	9.1	8.4	+ 8.3
Leather	nr	nr	--	2.6	3.1	- 16.1
Non-leather	nr	nr	--	6.5	5.3	+ 22.6
Luggage, total	nr	nr	--	48.3	54.6	- 11.5

(continued)

Exports

U.S. Exports of Specified Accessories, 1980, 1981
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			Value* (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Handkerchiefs, total	3,421.2	7,100.4	- 51.8%	$ 1.2	$ 2.1	- 42.9%
Cotton	2,738.4	5,190.0	- 47.2	0.9	1.6	- 43.7
Man-made fibers	344.4	812.4	- 57.6	0.1	0.2	- 50.0
All other textile fibers	338.4	1,098.0	- 69.2	0.2	0.3	- 33.3
Mufflers, scarves & shawls	1,137.6	1,450.8	- 21.6	0.7	0.8	- 12.5
Gloves & glove linings (thous. doz.), total	2,531.1	2,196.7	+ 15.2	27.6	26.6	+ 3.8
Cotton	726.8	694.7	+ 4.6	5.0	4.3	+ 16.3
Wool	26.1	4.1	+536.6	0.2	**	+472.7
Man-made fibers	172.4	121.4	+ 42.0	1.4	1.1	+ 27.3
All other textile materials	606.2	488.7	+ 24.0	5.4	4.4	+ 22.7
Leather or of fur on the skin	419.5	381.4	+ 10.0	8.1	11.3	- 28.3
Material, nspf	580.1	506.4	+ 14.5	7.5	5.3	+ 41.5
Leather belts, total	nr	nr	--	7.4	6.0	+ 23.3
Headwear, total (thous. doz.)	2,087.0	2,572.3	- 18.9	30.1	27.9	+ 7.9
Reinforced or laminated plastics	673.3	898.7	- 25.1	9.6	9.3	+ 3.2
Rubber or plastic, except reinforced or laminated plastics	460.6	328.0	+ 40.4	5.5	4.4	+ 25.0
Other headwear, except rubber or plastic	953.1	1,345.6	- 29.2	15.0	14.2	+ 5.6

nr = not reported.
nspf = not specified by kind.
* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.
** Less than $0.1 million.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410,
December 1980, 1981.

THE SIZE OF THE POTENTIAL MARKET

Resident Male Population of the U.S., 1981 & Projections to 1995*
(In Millions)

	1981	1985	1995	% Change 1995/1981	Percent of Male Population 1981	1985	1995
Total, all ages	111.4	116.1	126.3	+ 13.4%	100.0%	100.0%	100.0%
Under 15 years	26.2	26.5	29.0	+ 10.7	23.5	22.8	23.0
15 years & older	85.2	89.6	97.3	+ 14.2	76.5	77.2	77.0
15-19 years	10.4	9.4	8.7	- 16.3	9.3	8.1	6.9
20-24 years	10.9	10.8	8.7	- 20.2	9.8	9.3	6.9
25-34 years	19.3	20.9	20.4	+ 5.7	17.3	18.0	16.1
35-44 years	13.0	15.8	20.9	+ 60.8	11.7	13.6	16.5
45-54 years	10.9	10.9	15.3	+ 40.4	9.8	9.4	12.1
55-64 years	10.3	10.4	9.9	- 3.9	9.2	9.0	7.8
65 years & older	10.6	11.5	13.4	+ 26.4	9.5	9.9	10.6
Median age	29.1	30.2	33.3				

Resident Female Population of the U.S., 1981 & Projections to 1995*
(In Millions)

	1981	1985	1995	% Change 1995/1981	Percent of Male Population 1981	1985	1995
Total, all ages	117.9	122.5	133.3	+ 13.1%	100.0%	100.0%	100.0%
Under 15 years	25.0	25.3	27.7	+ 10.8	21.2	20.7	20.8
15 years & older	92.9	97.2	105.6	+ 13.7	78.8	79.3	79.2
15-19 years	10.0	9.0	8.3	- 17.0	8.5	7.3	6.2
20-24 years	10.8	10.5	8.4	- 22.2	9.2	8.6	6.3
25-34 years	19.6	20.9	20.1	+ 2.5	16.6	17.1	15.1
35-44 years	13.5	16.2	21.1	+ 56.3	11.5	13.2	15.8
45-54 years	11.6	11.6	16.1	+ 38.8	9.8	9.5	12.1
55-64 years	11.7	11.8	11.1	- 5.1	9.9	9.6	8.3
65 years & over	15.7	17.2	20.6	+ 31.2	13.3	14.0	15.4
Median age	31.6	32.8	36.0				

*These are middle-level projections, which assume a fertility rate of 1.9 births per woman, as well as middle-level mortality and immigration rates.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25 Nos. 917, 922.

THE SIZE OF THE POTENTIAL MARKET

The two age groups whose ranks will increase the most between 1981 and 1995 are those aged 35-44 and persons 65 and up, according to current Census Bureau projections. While the number of persons over 15 is expected to grow 13.9% to approximately 203 million, men and women aged 35-44 will rise 60.8% and 56.3%, respectively.

Demographic trends, in general, favor the fashion accessories market. A sizeable portion of the postwar baby boom will be moving into higher earning brackets and buying more luxury goods. The typical American household is becoming smaller, older and more affluent, with a large share having two or more incomes.

Working Women

An average of 47.9 million women were employed or looked for work in 1982, 52.7% of the 90.7 million women aged 16 and over in the U.S. Slightly more than half (51.5%) of women with husbands in the labor force were part of it themselves in 1982.

By 1995, the labor force participation rate for women was projected by the Bureau of Labor Statistics to be 61.2%. In that year, as in 1981, the highest participation rate will be reached among 20-24 year olds (85.3%). Women will account for two-thirds of the estimated 24.6 million person increase in the labor force from 1980 to 1995.

Civilian Labor Force Participation Rates for Women
By Specified Age Groups, 1982 & Projections for 1985, 1995

	Participation Rates (% of Age Group Population)		
	1982	1985*	1995*
Females, 16 years & older	52.6%	56.5%	61.2%
By age group:			
16 & 17 years	41.0	59.8	66.3
18 & 19 years	61.2		
20-24 years	69.8	76.5	85.3
25-34 years	68.0	75.1	83.7
35-44 years	68.0	72.9	81.7
45-54 years	61.6	61.7	66.2
55-64 years	41.8	41.6	42.3
65 years & older	7.9	7.7	6.8

*Population projections by age group assume a fertility rate at the replacement level, based on projections made from 1970 census figures. Total labor force growth rates assume a 1.8% annual growth rate from 1979 to 1985 and a 1.0% annual increase from 1985 to 1995.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings,
January 1983;
Monthly Labor Review, December 1980.

THE SIZE OF THE POTENTIAL MARKET

Working Women

Increasingly, women are being employed in "white-collar" occupations, many of which require that they dress-up for work. Almost a quarter of all employed women in 1981 were involved in professional-technical positions or as managers and administrators, compared with 19% of employed women in 1972. According to the 1982 Current Population Survey, nearly half a million more women worked in these occupations in 1982 than the previous year. Almost 60% of these women were employed in traditionally male-dominated fields such as computer specialists, engineering and law.

About 70% of working women in 1982 were full-time workers whose median income was $241 per week, up 7.6% over the 1981 median. After adjusting for inflation, this typical paycheck represented a 1.5% boost in purchasing power. Since 1979, the median weekly income of a full-time female worker rose 30% while the median for males increased 24%.

THE BRIDAL MARKET

For the sixth consecutive year, the number of marriages performed in the U.S. rose, reaching 2.44 million in 1982, 1% more than in 1981. During the decade of the 1980's, according to trade sources, the number of marriages will eclipse the 22.3 million performed during the previous decade by 7.4%, providing an expanded market for engagement and wedding rings.

More than two-thirds of first-time brides received an engagement ring with an average karat weight of 30 points. The average diamond engagement ring sold for an estimated $700 in 1980 versus $585 in 1979. Sales of engagement and wedding rings for both the bride and the groom was an estimated $575 million business in 1980.

Monthly Patterns in Marriages, 1981

	Marriages	
	Number* (Thous.)	% of Total
Total	2,438	100.0%
January	135	5.5
February	156	6.4
March	147	6.0
April	198	8.1
May	235	9.6
June	287	11.8
July	237	9.7
August	252	10.3
September	216	8.9
October	204	8.4
November	172	7.0
December	200	8.2

* Provisional

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1982.

RETAIL SALES

There is a dearth of information on the value of the retail market for accessories as a whole. The Department of Commerce reports that the total value at retail of all apparel reaching consumers in 1981 (including through other than retail outlets) amounted to $62.7 billion for women's and children's and $32.7 billion for men's and boys', for a grand total of $95.4 billion.

This Fact File concentrates on specific types of fashion accessories. Other merchandise often included in the accessory classification by retailers are covered in other Fact Files (including the Hosiery/Legwear and Men's Furnishings Fact Files).

If it is assumed that all accessories represented about 10% of total consumer expenditures for apparel, that would mean a market for the broadly-defined classification totaling some $9.5 billion. This does not include spending for jewelry or watches. One source places the value of all women's fashion accessories, excluding jewelry & watches at over $7.0 billion.

Reports from National Panel Diary's consumer panel, which consists of 6,500 nationally representative households, showed that purchases of women's accessories in 1982 were essentially flat in terms of dollars but fell 10.5% in the number of units sold.

Purchases of men's accessories by NPD panel members in 1982 were off 1.7% in dollars and 6.8% in units.

Percent Change in Reported Purchases of Men's & Women's Accessories 1981 vs. 1982

	% Change 1982/1981	
	Units	Dollars
Women's accessories		
Handbags	- 11.3%	- 6.7%
Gloves/mittens	- 8.8	+ 14.0
Belts	+ 5.2	+ 30.0
Scarfs/shawls	- 20.6	- 18.1
Hats	- 12.2	+ 7.8
Handkerchiefs	- 20.1	- 2.5
Wallets	- 33.3	- 17.6
Other accessories	+ 10.7	+ 73.8
Total	- 10.5	- 0.4
Men's accessories		
Gloves/mittens	- 8.5	+ 1.2
Belts	- 11.2	- 6.6
Scarfs/shawls	- 13.5	+ 10.7
Hats	- 23.3	- 26.3
Caps	- 11.9	+ 15.7
Handkerchiefs	- 9.5	+ 2.1
Wallets	- 34.1	- 36.6
Other accessories	+ 11.8	+ 34.3
Total*	- 6.8	- 1.7

* Includes men's ties.

RETAIL SALES

Personal consumption expenditures for all types of men's and women's jewelry and watches reached $12.9 billion in 1981, a considerable 14.4% jump over 1981. The 1981 dollar amount spent on jewelry and watches accounted for 0.7% of total U.S. personal consumption expenditures.

Personal Consumption Expenditures for Jewelry & Watches, 1979-1981
(Millions of $)

	1981	1980	1979	% Change 1981/1980	% Change 1981/1979
Jewelry & watches, total	$12,915	$11,287	$9,537	+ 14.4%	+ 35.4%

Source: Department of Commerce,
Office of Business Economics.

By Type of Retail Outlet

The 1977 Census of Retail Trade contains the only official information available on sales of men's and women's accessories in various types of retail outlets with payrolls. Not all store types broke out sales in detail, but the following information reflects sales in major outlet types. Comparative sales figures for prior census years are not available due to changes in the merchandise classification system.

Sales of men's accessories reported by leading outlet types amounted to a total of $1.2 billion in 1977. Department stores accounted for $704.4 million, or 59.3% of this total.

Reported Sales of Men's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's accessories (hats, gloves, belts, wallets, umbrellas, etc.)	36,426	100.0%	$1,187.0	100.0%
Department stores**	7,244	19.9	704.4	59.3
Men's wear stores	14,696	40.3	307.4	25.9
Family clothing stores	10,246	28.1	135.9	11.5
Other (women's ready-to-wear stores, men's shoe stores & mail order houses)	4,240	11.6	39.3	3.3

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Accessories Sales in Key Store Types, 1977

	Total Men's & Boys' Wear Sales* (Mil. $)	% of Total Accounted For By Men's Accessories
Department stores**	$10,574.9	6.7%
Men's wear stores	6,275.4	4.9
Family clothing stores	3,001.5	4.5

*Excludes men's & boys' footwear sales.
**See footnote for the preceding table.

Source for both tables:
U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Women's handbag and small leather goods sales reported by the major outlet types reached $1.2 billion in 1977. Of this total, department stores accounted for 56.1%, or $667.9 million.

Department stores were responsible for 67.6% of the $253.0 million in sales of women's hats, hairpieces and trimmings in the major outlet types during 1977, according to the census reports. In reported sales of other women's accessory items such as gloves, neckwear, belts and umbrellas, department stores accounted for 54.8% of the $977.5 million volume done by the major store types.

However, it should be noted that these accessories are also sold in other outlet types (variety stores, supermarkets, as well as specialized accessory stores, sporting good stores, etc.) for which sales are not available.

Reported Sales of Specified Women's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's handbags & small leather (and plastic) goods	46,765	100.0%	$1,190.5	100.0%
Department stores**	7,727	16.5	667.9	56.1
Women's ready-to-wear stores***	18,311	39.2	234.3	19.7
Family clothing stores	8,972	19.2	96.2	8.1
Shoe stores	8,450	18.1	126.5	10.6
Mail order houses	3,305	7.1	65.6	5.5

(contined)

RETAIL SALES

By Type of Retail Outlet

Reported Sales of Specified Women's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's accessories (gloves, neckwear, belts, umbrellas, etc.)	40,585	100.0%	$ 977.5	100.0%
Department stores**	7,120	17.5	536.0	54.8
Women's ready-to-wear stores***	20,657	50.9	306.4	31.4
Family clothing stores	8,848	21.8	103.0	10.5
Other stores (men's wear stores, shoe stores & children's wear stores)	938	2.3	12.9	1.1
Mail order houses	3,022	7.5	19.2	2.0
Women's hats, trimmings, etc.	12,982	100.0	253.0	100.0
Department stores**	5,557	42.8	171.1	67.6
Women's ready-to-wear stores***	4,524	34.8	40.8	16.1
Millinery stores	256	2.0	20.5	8.1
Family clothing stores	2,299	17.7	14.4	5.7
Mail order houses	346	2.7	6.2	2.5

* and ** See footnotes on table of men's accessories sales.

***Does not include sales in women's accessory and specialty stores (handbag stores, glove stores, etc.) Sales in these stores totaled $494.5 million in 1977, in 2,937 outlets with payrolls.

Percent of Total Women's and Children's Wear Sales Accounted For By Sales of Specified Accessories in Key Store Types, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% Accounted For By:		
		Handbags, Small Leather Goods	Hats, Hair-pieces	Accessories (gloves, belts, etc.)
Department stores**	$ 16,250.7	0.9%	0.2%	0.7%
Women's ready-to-wear stores***	11,066.5	1.9	0.3	2.5
Family clothing stores	3,471.6	1.2	0.2	1.3

* Excludes women's and children's footwear sales.

** See footnote on table of men's accessories sales, page 35.

*** Does not include sales in women's accessory and specialty stores.

Source for both tables: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Men's and women's jewelry sales in the major store types were reported at $8.15 billion in 1977, according to the census of retail trade. In this report, jewelry sales include not only both precious metal and costume jewelry, but also watches. As previously noted, not all store types broke out sales in detail; therefore, sales of jewelry in supermarkets and other type stores are not included in the table below.

Reported Sales of Jewelry by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Jewelry	110,575	100.0%	$8,150.8	100.0%
Department stores**	8,355	7.6	1,753.9	21.5
Women's wear stores	9,546	8.6	156.2	1.9
General merchandise stores (except variety & department)	7,107	6.4	675.9	8.3
Jewelry stores & miscellaneous stores	27,828	25.2	4,465.0	54.7
All other store types	53,779	48.6	739.3	9.1
Non-store retailers (mail order houses & direct selling)	3,960	3.6	360.5	4.4

**(See footnotes on table of men's accessories sales, page 35.)

Percent of Total Store Sales Accounted for by Jewelry Sales In Key Store Types, 1977

	Total Store Sales (Mil. $)	% of Total Accounted For By Jewelry
Department stores**	$76,909.4	2.3%
Women's wear stores	13,163.8	1.1
General merchandise stores (except variety & department stores)	9,597.7	7.0
Jewelry stores	5,010.5	85.6

**See footnote on table of men's accessories sales, page 35.

Source for both tables: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Merchandising and operating results in three major store types selling accessories are reported below. Data on the total number of stores in 1980 and their total sales of all merchandise in recent years are also shown.

Trends of Total Sales in Major Apparel Store Types, 1980 - 1982

	Number of Stores	Sales	
		Mil. $	% Change From Previous Year
Department stores			
1982(p)	na	106,305	+ 3.0%
1981(r)	na	103,232	+11.4
1980(r)	9,240	92,669	+ 3.0
Men's & boys' wear stores			
1982(p)	na	7,613	- 2.2
1981	na	7,786	- 0.6
1980	18,106	7,830	--
Women's ready-to-wear stores			
1982(p)	na	17,449	+ 6.7
1981	na	16,352	+ 8.5
1980	39,969	15,074	+ 0.6

(p) = preliminary
(r) = revised
na = not available

Source: U.S. Bureau of the Census,
Monthly Retail Sales;
County Business Patterns, 1980.

RETAIL OPERATING RATIOS

Department Stores

The median double-digit sales increase in 1981 of several accessory items--handbags, small leather goods, men's accessories and miscellaneous apparel accessories--outpaced the typical 6.7% sales rise of the entire upstairs store in department stores with sales over $1 million. According to the annual Merchandising and Operating Results report issued by the National Retail Merchants Association, sales of fine jewelry and watches were up only 4.3% over 1980 while costume jewelry sales gained a median 7.2%.

At $449.60 per square foot, typical sales in the fine jewelry and watches department were approximately four times the size of sales per square foot for the whole upstairs store ($111.80). Luggage was the sole accessory item whose ratio of sales to square foot of selling space ($65.50) was below the upstairs store median.

RETAIL OPERATING RATIOS

Department Stores

Merchandising & Operating Results of Specified Accessories In Department Stores With Total Sales Over $1 Million, 1981

(Median Results)

	Women's Accessories			
	Fine Jewelry/ Watches (35)#	Costume Jewelry (91)#	Gloves (75)#	Handbags (64)#
Net sales, % change from last year	+ 4.3%	+ 7.2%	+ 5.4%	+ 13.4%
Sales, % to total store sales	1.4	1.7	0.5	1.5
Net sales, % of merchandise division***	12.2	14.2	4.6	12.0
$ sales per square foot of selling space (main or largest selling unit)	$449.6	$217.0	$175.3	$138.8
Gross margin, % of sales	44.2%	47.8%	49.7%	48.3%
Number of stock turns (times)	1.6	2.8	3.6	3.6

	Women's Accessories			
	Small Leather Goods (61)#	Misc. Apparel Accessories* (101)#	Men's Accessories** (44)#	Luggage (99)#
Net sales, % change from last year	+ 10.4%	+ 11.1%	+ 13.5%	+ 3.8%
Sales, % to total store sales	0.4	0.9	0.8	0.6
Net sales, % of merchandise division***	3.4	7.2	10.2	18.1
$ sales per square foot of selling space (main or largest selling unit)	$205.0	$138.4	$332.5	$ 65.5
Gross margin, % of sales	48.1%	48.9%	50.5%	44.7%
Number of stock turns (times)	3.1	3.0	3.0	1.7

* Women's miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas, folded rain accessories and belts.

** Men's accessories include ties, handkerchiefs, jewelry, small leather goods, gloves, mufflers, toiletries & umbrellas.

*** For women's accessories, the merchandise division is adult female intimate apparel and accessories; for men's accessories, adult male apparel; for luggage, hobby, recreation & transportation.

# Number in parentheses refers to the number of reporting firms in each category.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1981"

Women's glove sales shot up 14.4% in 1981 in specialty stores with total sales over $1 million, according to the National Retail Merchants Association annual Merchandising and Operating Results report. Handbag and small leather goods sales increased 13.9% in 1981 compared to overall store average of 8.3%. Jewelry and watch sales lagged behind, only 1.9% ahead of 1980 sales.

RETAIL OPERATING RATIOS

Women's Specialty Stores

Merchandising & Operating Results of Specified Accessories In Women's Specialty Stores With Total Sales Over $1 Million, 1981

		Women's Accessories			
	Total Store (48)**	Jewelry & Watches (23)**	Handbags & Small Leather Goods (23)**	Gloves (13)**	Misc. Apparel Accessories* (29)**
Net sales, % change from last year	+ 8.3%	+ 1.9%	+ 13.9%	+ 14.9%	+ 6.3%
Sales, % to total store sales	100.0	2.5	2.9	0.8	2.0
Net sales, % of merchandise division#	--	15.4	17.1	5.2	11.1
$ sales per square foot of selling space (main or largest selling unit)	$157.3	$228.5	$142.9	$207.7	$220.8
Gross margin, % of sales	43.3%	46.2%	45.3%	47.7%	45.8%
Number of stock turns (times)	3.1	2.1	3.2	3.2	3.0

* Women's miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas, folded rain accessories and belts.

** Number in parentheses refers to the number of reporting firms in each category.

# For women's accessories, the merchandise division is adult female intimate apparel and accessories.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1981"

Men's Wear Stores

While sales in men's wear stores surveyed by the Menswear Retailers of America rose 5.3% in 1981, accessory sales moved up only 1.7% from 1980 levels. Men's belts turned in a better 1981 performance with an increase in sales of 7.8%.

Merchandising & Operating Results of Men's Accessories In Men's Wear Stores, 1981

	Total Store	Men's Accessories	Men's Belts
% change in sales from last year (60)*	+ 5.3%	+ 1.7%	+ 7.8%
% to total store sales (71)*	100.0	2.2	1.1
% to total sales in merchandise division** (71)*	--	12.8	6.1
% distribution of average inventory within merchandise division** (71)*	--	17.2	7.7
Number of stock turns (times) (37)*	1.9	1.6	1.5
Markdowns, % of sales (45)*	12.9	6.9	4.3

* Number in parentheses refers to the number of reporting firms in each category.

** Merchandise division for accessories and belts is men's furnishings.

Source: Menswear Retailers of America
1981 Annual Business Survey

RETAIL SALES BY MONTH

In a typical month, sales of women's handbags and small leather goods in department stores account for 4.1% of women's apparel and accessories sales. Three of the four specified accessory items hit their sales peak, as a percentage of total departmental sales, in December--handbags and small leather goods (5.9%), women's and children's gloves (3.6%) and women's and misses' neckwear and scarfs (3.6%). The exception is millinery, which accounts for its highest portion of apparel and accessory sales in March (3.7%).

Percent of Total Women's Apparel & Accessories Sales in Department Stores Accounted For by Specified Accessories, by Month

	Handbags & Small Leather Goods	Millinery	Women's & Children's Gloves	Women's & Misses' Neckwear & Scarfs
January	3.0%	2.0%	1.9%	2.2%
February	3.6	2.4	1.6	2.6
March	3.8	3.7	1.8	2.4
April	4.0	3.2	1.8	2.6
May	4.5	1.8	1.4	2.7
June	4.1	1.5	1.1	3.0
July	3.6	1.4	0.9	2.7
August	3.2	1.9	1.0	2.3
September	4.0	3.0	1.5	2.6
October	3.8	2.9	2.4	2.9
November	4.3	2.3	2.8	2.8
December	5.9	1.5	3.6	3.6
5 year average	4.1	2.2	2.0	2.8

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data (1961-1965), latest available figures.

RETAIL ADVERTISING

Percent of 1981 Newspaper Advertising Linage of Specified Accessories Used Each Month

	Fine Jewelry	Handbags	Luggage
Total linage	100.0%	100.0%	100.0%
January	3.1	4.2	6.0
February	6.5	4.9	7.0
March	5.7	8.6	8.5
April	7.0	11.0	5.9
May	10.8	10.9	11.5
June	6.8	3.9	8.9
July	3.6	5.7	4.9
August	5.9	8.5	10.1

(continued)

RETAIL ADVERTISING

Percent of 1981 Newspaper Advertising Linage of Specified Accessories Used Each Month
(continued)

	Fine Jewelry	Handbags	Luggage
September	6.2%	9.0%	5.5%
October	8.1	8.8	6.9
November	16.6	10.4	11.2
December	19.7	14.1	13.6

Source: The Advertising Checking Bureau, Inc.
Neustadt Reports Div., covering retail newspapers in seven cities - Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles & Washington.

CONSUMER BUYING HABITS

In May 1982, 1,010 teenage girls, members of Seventeen Magazine's 2,000-member Consumer Panel, which represents a cross-section of teens nationwide, answered the magazine's Spring Apparel Study on the apparel and accessory items they purchased during the preceding year. This information was then projected to the entire female teenage market to get estimates of the total number of girls who purchased accessories, the number purchased and the amount spent on them.

The survey estimated that in the year preceding the study, 12.7 million teenage girls bought 117.5 million assorted accessories for which they spent a combined $1.4 billion. Handbag purchases accounted for the largest dollar volume, $286.2 million.

Purchases of Specified Accessories by Teenage Girls

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures ($000)
Jewelry			
Necklaces	11,863	16,739	$ 153,329
Pins	6,531	10,812	75,360
Earrings	6,372	15,717	151,041
Bracelets	3,710	7,568	76,059
Watches	2,406	2,887	183,931
Belts			
Leather	4,880	8,735	109,013
Suede	59	62	924
Other	7,518	13,365	85,269

(continued)

CONSUMER BUYING HABITS

Purchases of Specified Accessories by Teenage Girls
(continued)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures ($000)
Scarfs			
Cotton	1,784	2,914	$ 19,699
Silk	1,149	1,685	19,293
Woven	490	659	5,299
Knit	269	379	2,134
Gloves			
Knit	1,873	2,185	19,731
Leather	268	294	5,469
Hats			
Knit	1,131	1,747	19,933
Felt	436	446	5,366
Handbags	8,273	16,913	286,168
Wallets/billfolds/key cases	3,107	5,075	61,611
Sunglasses	5,539	7,324	123,336
Umbrellas	1,472	1,963	21,750
Total girls buying accessories	12,771	117,469	$1,424,715

Source: Seventeen Magazine,
1982 Spring Apparel Study.

A buying intentions study, commissioned by Chain Store Age and conducted by Leo Shapiro & Associates among 9,000 nationally representative households, found only 2.4% of U.S. households might purchase luggage during 1983. Two demographic groups stand out as having higher-than-expected luggage buying intentions. Almost one-fifth of respondents aged 20-24 plan to buy, as do an unspecified percentage of members of five-person households whose total income exceeds $40,000.

Of all those who expect to purchase luggage in 1983, 17.7% plan to spend under $50 while an additional 15.5% anticipate spending between $100 and $150 for luggage. More than half of the total potential luggage customers expect to buy brand names.

Prices Consumers Expect to Pay for Luggage in 1983

Price Points	% of Respondents*
Under $50	17.8%
$51 - $99	13.1
$100 - $149	15.5
$150 - $299	12.9
$300 & over	10.5
No answer	30.2

* Percent of respondents who expect to purchase luggage in 1983.

Source: Chain Store Age,
General Merchandise Edition,
December 1982

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (May)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (May)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.50

Infants', Toddlers', Girls' and Boys' Wear

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Gregory Becker, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

MARKET TRENDS........ 1
GENERAL INDUSTRY STATISTICS........ 2
  EMPLOYMENT & EARNINGS........ 4
  CONCENTRATION IN THE INDUSTRY........ 5
  INDUSTRY STATISTICS BY REGION........ 6
  OPERATING RATIOS........ 8
PRODUCTION........ 8
  CHILDREN'S & GIRLS' WEAR........ 8
  BOYS' WEAR........19
MATERIALS CONSUMED IN PRODUCTION........23
SHIPMENTS........24
  INFANTS', CHILDREN'S & GIRLS' WEAR........25
  BOYS' WEAR........27
PRODUCER PRICES........29
FOREIGN TRADE........29
THE SIZE OF THE MARKET........30
RETAIL SALES........35
RETAIL SALES BY STORE TYPE........36
  SEASONAL PATTERNS........40
RETAIL ADVERTISING........40
CONSUMER PRICES........41
CONSUMER BUYING HABITS........41

SCHEDULE OF ADDITIONAL FACT FILES........50

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In most instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-457-0

Printed in the United States of America

INFANTS', TODDLERS', BOYS' & GIRLS' WEAR

Market Trends

Retail sales of children's wear, as a whole in 1982 were modestly ahead of 1981, according to industry analysts. Consumers who held back on purchases of other items were more inclined to spend for their children, and the outlook is for a significant gain over the $14-$15 billion sales total registered last year, depending on the strength of recovery in the general economy.

Several factors favor growth in the market, particularly for younger children. The number of births has been on the rise, gains are being registered in the buying power of "dual-income" families, and the number of first-births, which generate a disproportionately large share of the infants' wear market, is now unusually high. Recent studies indicate that spending by parents on their first child averages as much as 130% higher than spending on subsequent children. The number of new mothers who are returning to the labor force after giving birth is growing, and this is expected to generate increased spending for children as family income rises.

A stimulus to the children's wear market is coming from licensing activities, and growing awareness of designer names in youth apparel. According to an industry newsletter, licensing as a whole represented $13.7 billion in sales in 1981, of which about a third came from sales of apparel and accessories. Licensed "characters" have always been popular in children's wear; the market is big but reliable figures on the exact size are not available. Market sources indicate that licensed apparel has been sold almost entirely by large chains and mass merchandisers, thus dramatically increasing these store types' share of the overall children's wear business.

Although figures on import penetration in the children's wear market are difficult to determine due to its combination with women's and men's wear, it is apparent that imports are as major a concern to domestic children's wear manufacturers as they are to the rest of the apparel industry. Orders for major lines from Europe in 1983 are well ahead of the 1982 level, according to importers' representatives (Women's Wear Daily, March 14, 1983). These imports are not only being spurred by the strength of the U.S. dollar but also by a change in the perception of the European lines as being a low-priced, low-quality imitation of domestic products.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. In intracensus years the Bureau compiles an annual survey of a sample of manufacturers, and reports from these are adjusted for comparability with findings in the complete census.

For a selected group of major industry classifications, including children's outerwear (SIC 236), the U.S. Bureau of Industrial Economics has published estimates on manufacturing activity for 1981 and 1982 (1983 U.S. Industrial Outlook) as noted in the following table. According to this source, value of shipments in the industry declined at a compound annual rate of - 0.3% in constant 1972 dollar terms, in the period 1972-1982.

GENERAL INDUSTRY STATISTICS

Trends in Value of Shipments, 1972-1982

	Children's Coats, Suits, Dresses, Blouses, Total (SIC 236)			Children's Dresses & Blouses (SIC 2361)		
	1982	1981	1972	1982	1981	1972
Current dollars (mils.)	$2,166	$2,100	$1,422	$1,035	$1,006	$ 655
Constant (1972) dollars (mils.)	1,389	1,401	1,422	632	650	655
Compound annual rate of growth (loss) 1972-1982	- 0.3%			- 0.4%		

Source: U.S. Bureau of Industrial Economics, 1983 U.S. Industrial Outlook.

Children's Dresses & Blouses (SIC 2361*)

	1980	1979	1977
Number of companies	na	na	455
Number of establishments, total**	436	457	519
Number with 20 or more employees	320	327	374
Employees, total (thous.)	37.0	35.5	35.2
Production workers (thous.)	31.7	30.8	30.4
Payroll (mil. $)	$ 288.2	$ 248.4	$228.4
Value added by manufacture # (mil. $)	553.3	476.5	444.6
Value of industry shipments ## (mil. $)	968.5	896.0	824.7
Capital expenditures, new (mil. $)	7.0	0.8	6.4

Children's Coats & Suits (SIC 2363*)

	1980	1979	1977
Number of companies	na	na	108
Number of establishments, total**	90	93	120
Number with 20 or more employees	55	62	70
Employees, total (thous.)	6.3	6.5	6.7
Production workers (thous.)	5.3	5.7	5.7
Payroll (mil. $)	$ 50.3	$ 48.8	$ 45.8
Value added by manufacture # (mil. $)	54.3	94.3	90.2
Value of industry shipments ## (mil. $)	176.5	178.7	173.8
Capital expenditures, new (mil. $)	2.4	3.1	1.3

GENERAL INDUSTRY STATISTICS

Children's Outerwear, n.e.c. (SIC 2369*)

	1980	1979	1977
Number of companies	na	na	307
Number of establishments, total**	265	281	363
Number with 20 or more employees	200	205	242
Employees, total (thous.)	29.0	26.5	29.3
Production workers (thous.)	24.1	22.7	25.1
Payroll (mil. $)	$ 215.9	$ 182.4	$ 184.9
Value added by manufacture # (mil. $)	488.4	364.9	344.4
Value of industry shipments ## (mil. $)	885.2	720.0	718.8
Capital expenditures, new (mil. $)	11.5	8.0	6.7

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, shown below:

SIC 2361 comprises establishments primarily engaged in manufacturing girls', children's and infants' dresses, blouses, waists, and shirts, cut and sewed from purchased woven or knit fabric.

SIC 2363 covers establishments primarily engaged in manufacturing girls', children's and infants' coats and suits, cut and sewed from woven and knit fabric.

SIC 2369 includes establishments primarily engaged in manufacturing girls', children's and infants' outerwear, not elsewhere classified, cut and sewed from purchased woven or knit fabric. It covers items such as tops, playwear, swimwear, robes, skirts, headwear, neckwear, etc.

NOTE: Separate industry figures are not available on boys' wear and on children's underwear and nightwear manufacturers. These are combined in industry data on men's and boys' manufacturers and women's and children's manufacturers, which are included in other Fact Files covering specific apparel categories.

**Each business location is counted as a separate establishment. Figures for 1979 and 1980 are from County Business Patterns (U.S. Census Bureau).

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

(continued)

GENERAL INDUSTRY STATISTICS

##The value of industry shipments includes both primary and secondary products made by manufacturers in the industry, as well as receipts for contract work and miscellaneous receipts. The value of primary products made in this industry, as well as the value of these products made by secondary producers is reported in tables on product shipments on pages 25-28.

na = not available
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980

Employment & Earnings

Total employment in children's outerwear fell by 5.8% in 1982 according to the U.S. Bureau of Labor Statistics, declining to a total of 60,200. In the children's dress and blouse segment of the market, total employment also declined but not as rapidly, dropping 4.4% to 26,000 during the same period.

Production workers in children's outerwear averaged 35.2 hours a week in 1982 (not including overtime) compared with 36.1 in 1981, a decrease of 2.5%. During the same period, hourly earnings increased by a slight 1.4%. For production workers in the dress and blouse category, employment also fell, down 4.5% from the previous years total while average weekly earnings showed only minimal gains.

The U.S. Bureau of Industrial Economics reported that in the period 1972-1982, production worker employment in the children's outerwear industry declined at a compound annual rate of 0.8%, while total employment registered a compound annual rate of decline of 0.3%.

Employment & Earnings in Children's Wear Industries, 1979 - 1982

	Annual Averages				% Change
	1982	1981	1980	1979	1982/1981
Children's outerwear (dresses, blouses, coats, suits)(SIC 236)					
All employees (thous.)	60.2	63.9	64.4	65.7	- 5.8%
Production workers (thous.)	51.0	54.1	55.1	56.8	- 5.7
Average weekly earnings	$166.50	$164.26	$151.20	$137.86	+ 1.4
Average weekly hours	35.2	36.1	36.0	35.9	- 2.5
Average overtime hours	1.0	1.2	1.2	1.2	- 16.7
Dresses & blouses (SIC 2361)					
All employees (thous.)	26.0	27.2	27.3	27.5	- 4.4
Production workers (thous.)	23.2	24.3	24.5	24.8	- 4.5
Average weekly earnings	$164.85	$161.36	$146.91	$136.42	+ 2.2
Average weekly hours	35.0	35.7	35.4	35.9	- 2.0
Average overtime hours	0.9	1.1	0.9	1.2	- 18.2

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Plants producing children's wear are for the most part small operations with fewer than 50 employees. However, although figures for larger operations are generally withheld by the BLS to avoid disclosure of individual companies, plants with over 100 employees (a relatively small share of the total number) account for a major percentage of employment and of total shipments.

In dresses and blouses, for example, 21.1% of the plants accounted for 58.8% of total employment. According to the U.S. Bureau of Industrial Economics, in 1982 the four largest companies accounted for 15% of the children's dress & blouse industry shipments.

Children's Apparel Industries by Employment Size, 1980

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Dresses & blouses (SIC 2361) total	436	100.0%	31,998	100.0%
By establishment size:				
Under 20 employees	116	26.6	1,108	3.5
20 - 49 employees	127	29.1	4,690	14.7
50 - 99 employees	101	23.2	7,411	23.2
100 - 249 employees	72	16.5	11,612	36.3
250 or more employees	20	4.6	7,177	22.5
Coats & suits (SIC 2363) total	90	100.0	5,557	100.0
By establishment size:				
Under 20 employees	35	38.9	(D)	na
20 - 49 employees	22	24.4	760	13.7
50 - 99 employees	21	23.3	1,536	27.6
100 - 249 employees	7	7.8	902	16.2
250 or more employees	5	5.6	(D)	na
Other outerwear (SIC 2369) total	265	100.0	26,961	100.0
By establishment size:				
Under 20 employees	65	24.5	(D)	na
20 - 49 employees	67	25.3	2,321	12.0
50 - 99 employees	46	17.4	3,322	12.3
100 - 249 employees	59	22.3	9,357	34.7
250 or more employees	28	10.6	(D)	na

na = not available
(D) = withheld to avoid disclosure

Source: U.S. Bureau of the Census, County Business Patterns, 1980 (CBP-80-1)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios in the Children's Wear Industries, 1977

	Value of Industry Shipments (Mil. $)	Percent accounted for by:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Dresses & blouses (SIC 2361)	$824.7	15%	23%	41%	64%
Coats & suits (SIC 2363)	173.8	32	47	72	92
Outerwear, n.e.c. (SIC 2369)	718.8	24	36	57	76

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9

Employment & Share of Shipments in Large Plants in the Children's Wear Industry, 1981

	Number of Plants		% of industry shipments accounted for by plants With 100 or more employees
	With 20+ Employees	With 100+ Employees	
Dresses & blouses (SIC 2361)	259	96	71%
Coats & suits (SIC 2363)	56	21	71
Outerwear, n.e.c. (SIC 2369)	250	101	77

Source: Sales & Marketing Management,
"Survey of Industrial Purchasing Power,"
April 1982. All Rights Reserved.

By Region

New York accounted for the major share of plants in all three categories of children's wear reported on in the 1977 Census of Manufactures. The segment with the highest concentration of its plants located in New York was the suits and coats group where nearly two out of every five plants were located in that state.

Pennsylvania ranked second in the number of plants in two out of the three measured categories in 1977 with New Jersey surpassing it with 27 plants producing children's suits and coats in 1977.

GENERAL INDUSTRY STATISTICS

By Region

Leading Manufacturing States in Children's Wear Industries, 1977

	No. of Establishments		Value Added By Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
	Total	With 20+ Employees		
Children's dresses & blouses, (SIC 2361)				
Leading states:				
New York	154	91	$ 103.4	$ 241.9
Pennsylvania	79	65	61.8	101.7
New Jersey	56	41	32.8	71.8
California	35	20	32.5	73.5
North Carolina	35	34	37.5	61.2
Florida	22	14	9.0	17.2
Texas	20	16	22.8	35.3
Georgia	8	6	2.8	4.0
U.S. total	519	374	444.6	824.7
Leading states, total	409	287	302.6	606.6
Percent of U.S. total	78%	77%	68%	74%
Children's suits & coats (SIC 2363)				
Leading states:				
New York	46	19	$ 21.5	$ 55.4
New Jersey	27	13	11.1	21.1
Pennsylvania	10	8	9.7	12.7
North Carolina	6	5	3.8	5.5
Georgia	5	4	2.4	3.9
U.S. total	120	70	90.2	173.8
Leading states, total	94	49	48.5	98.6
Percent of U.S. total	78%	70%	54%	57%
Children's outerwear, n.e.c., (SIC 2369)				
Leading states:				
New York	121	59	$ 56.7	$ 142.3
Pennsylvania	31	28	30.9	50.8
New Jersey	28	17	12.1	26.1
North Carolina	22	19	33.0	56.6
Florida	16	11	13.5	26.3
Massachusetts	16	9	13.9	26.6
Alabama	15	11	23.2	43.3
Georgia	13	13	28.3	51.2
Virginia	7	7	16.4	41.3
Tennessee	6	5	8.7	14.1
U.S. total	363	242	344.4	478.6
Leading states, total	275	179	236.7	718.8
Percent of U.S. total	76%	74%	69%	67%

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23C.

GENERAL INDUSTRY STATISTICS

Operating Ratios

The following financial results were compiled by the Federal Trade Commission, in its Annual Line of Business Report, released November 1982.

Operating Ratios of Children's Outerwear Producers, 1976

	Children's Outerwear
Operating income to assets	0.2
Operating income to sales	0.1
Media advertising expense to sales	0.5
Total selling expense to sales	9.2
Total assets to sales	40.2

Source: Federal Trade Commission,
Bureau of Economics,
Annual Line of Business Report, 1976
(Issued 1982)

PRODUCTION

Children's & Girls' Wear

Annual data on the production of major types of children's & girls' wear, based on a survey of all known manufacturers and jobbers (except very small firms), is reported in the Current Industrial Reports issued by the U.S. Bureau of the Census. In 1981 a number of manufacturers not previously included in the annual surveys were added and this has affected comparability of 1981 and 1980 data to varying degrees.

After adjusting data for comparability with the prior year, the largest gain in production in 1981 was registered by the girls', sub-teen & teenage girls' category, whose cuttings were up nearly 20% from the preceding year.

However, the majority of groups reported on by the Census Bureau showed declines in production in 1981 over 1980. The largest decline in 1981 was registered by the coats and legging sets, snowpants sets, and ski and snow suits whose total fell to 2.3 million units, a decline of 44% from the preceding year.

Production of Specified Types of Children's & Girls' Wear, 1981
(Thousands of Units)

	1981	Estimated % Change 1981/1980 (Adjusted)
Dresses, total	74,136	+ 3.3%
Girls', sub-teen & teenage	24,048	- 13.5
Children's	30,888	- 5.0
Infants' & toddlers'	19,200	+ 6.0

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear, 1981

(Thousands of Units)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Blouses (excluding knit outerwear sport shirts), total	44,088	- 6.8%
Girls', sub-teen & teenage	28,212	- 8.3
Children's, infants' & toddlers'	15,876	- 3.7
Knit outerwear sport shirts, except sweatshirts, total	133,260	- 0.1
Girls', sub-teen & teenage	15,912	- 7.0
Children's	71,280	+ 0.9
Infants' & toddlers'	46,068	+ 1.3
Sweatshirts, total	2,982	na
Sweaters, total	13,056	+ 6.4
Coats, excluding coat & legging sets, total	4,908	- 3.2
Girls', sub-teen & teenage	2,088	- 10.7
Children's & infants'	2,820	+ 2.8
Coat & legging sets, snowpants sets, & ski & snow suits, total	2,256	- 44.2
Raincoats & raincapes, total	420	- 10.3
Jackets, total	7,980	+ 9.8
Vests, total	1,596	+ 5.7
Suits, total	4,848	+ 9.2
Skirts, total	7,752	- 16.3
Slacks, incl. jean-cut casual slacks, total	48,588	+ 1.4
Girls' sub-teen & teenage	15,816	- 21.7
Children's & infants'	32,772	+ 17.3
Jeans & dungarees, total	41,184	+ 10.1
Girls', sub-teen & teenage	11,784	+ 3.4
Children's & infants'	29,400	+ 13.1
Shorts, total	21,888	+ 3.2
Girls', sub-teen & teenage	7,500	+ 19.7
Children's & infants'	14,388	- 0.7
Playgarments, incl. playsuits & haltertops, total	100,272	- 9.5
Girl's, sub-teen & teenage	6,468	+ 7.0
Children's	25,908	- 4.6
Infants' & toddlers'	67,896	- 12.2
Swimsuits, total	11,196	+ 9.5
Panties, incl. pettipants, total	160,092	- 6.1
Girl's & children's	98,748	- 4.4
Infants' & toddlers'	61,344	- 8.8

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Specified Types of Children's & Girls' Wear, 1981
(Thousands of Units)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Slips, vests & undershirts, total	79,548	- 4.0%
Girls' & children's	25,500	- 4.9
Infants' & toddlers'	54,048	- 3.5
Nightgowns, total	28,404	- 0.3
Girls' & children's	19,740	+ 8.0
Infants' & toddlers'	8,664	- 14.1
Pajamas. incl. heavyweight sleeping garments with feet, total	62,388	- 7.8
Girls' & children's	16,872	- 16.1
Infants' & toddlers'	45,516	- 4.0
Robes, girls', children's, infants'	3,228	- 2.0

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

PRODUCTION

Children's & Girls' Wear

Production of hosiery for infants and children by U.S. mills totaled over 31 million pairs in 1981, up 8.3% over the 1980 total. Knee-highs registered the strongest gains.

Production of Infants' & Children's Hosiery, 1980, 1981
(Thousands of Pairs)

	1981	1980	% Change 1981/1980
Infants' & children's hosiery (sizes 3-8½), total	31,195	28,807	+ 8.3%
Footsocks	794	720	+ 10.3
Anklets	20,494	19,260	+ 6.4
Knee-highs	7,686	6,620	+ 16.1
Waist-highs	1,000	943	+ 6.0
Mid-calf/crew	1,221	1,264	- 3.4

Note: Production of hosiery for boys and girls is not separately reported, but combined in a total on production of hosiery sizes 8-11 which includes women's. For this information, see the HOSIERY FACT FILE.

Source: National Association of Hosiery Manufacturers, 1981 Hosiery Statistics.

Diapers

Production of Infants' Diapers
(Thousands of Units)

	1981	1980	% Change 1981/1980
Diapers, total	115,296	113,220	+ 1.8%
Bird's-eye	55,452	51,108	+ 8.5
Gauze	59,844	62,112	- 3.6

Source: National Cotton Council of America
Cotton Counts Its Customers 1982

PRODUCTION

Children's & Girls' Wear

The distribution of 1980 and 1981 cuttings of children's and girls' clothing by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' dresses, total	100.0%	100.0%
By construction:		
Woven fabric	64.4	66.6
Knit fabric	21.6	29.2
Construction, n.s.k.	14.0	4.1
By fabric:		
All cotton & chiefly cotton	44.8	37.5
All man-made & chiefly man-made	38.7	55.4
All wool & chiefly wool	3.1	3.2
All other fabric		
Fabric, n.s.k.	13.4	4.0
Children's dresses, total	100.0	100.0
By construction:		
Knit fabric	24.7	21.4
Woven fabric	58.1	69.9
Construction, n.s.k.	17.2	8.7
By fabric:		
All cotton & chiefly cotton	20.4	23.9
All man-made & chiefly man-made	62.6	65.4
All wool & chiefly wool	17.1	10.7
All other fabric		
Fabric, n.s.k.		
Infants' & toddlers' dresses, total	100.0	100.0
By construction:		
Woven fabric	64.3	69.6
Knit fabric	12.6	14.5
Construction, n.s.k.	23.1	15.8
By fabric:		
All cotton & chiefly cotton	17.7	18.1
All man-made & chiefly man-made	58.3	64.4
All other fabric	21.2	17.5
Fabric, n.s.k.		
Girls', sub-teen & teenage girls' blouses, exc. knit outerwear sport shirts, total	100.0	100.0
By construction:		
Woven fabric	49.3	58.1
Knit fabric	37.1	32.2
Construction, n.s.k.	13.6	9.7

(continued)

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' blouses (cont'd.)		
By fabric:		
All cotton & chiefly cotton	18.6%	12.8%
All man-made & chiefly man-made	60.5	72.0
All other fabric Fabric, n.s.k.	20.9	15.2
Children's, infants' & toddlers' blouses, exc. knit outerwear sport shirts, total	100.0	100.0
By construction:		
Woven fabric	46.6	39.5
Knit fabric	23.8	38.1
Construction, n.s.k.	29.6	22.4
By fabric:		
All cotton & chiefly cotton	39.9	32.0
All man-made & chiefly man-made	45.2	63.8
All other fabric Fabric, n.s.k.	14.8	4.2
Girls', sub-teen & teenage girls' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	35.4	31.0
All man-made & chiefly man-made	59.0	67.0
Fabric, n.s.k.	5.6	2.0
Children's knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	23.4	30.1
All man-made & chiefly man-made	70.9	65.3
Fabric, n.s.k.	5.7	4.6
Infants' & toddlers' knit outerwear sport shirts, exc. sweatshirts, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	20.2	21.9
All man-made & chiefly man-made	71.4	78.1
Fabric, n.s.k.	8.4	--
Girls', children's & infants' sweaters, incl. sweater vests, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	79.7	84.5

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction 1980, 1981
(Percent Distribution)
(continued)

	Percent 1981	Percent 1980
Girls', children's & infants' sweaters (cont'd.)		
By fabric (cont'd.)		
All cotton & chiefly cotton All wool & chiefly wool Fabric, n.s.k.	20.3%	15.5%
Girls', sub-teen & teenage girls' coats, exc. coat & legging sets, total	100.0	100.0
By fabric:		
All wool & chiefly wool	5.2	(D)
All man-made & chiefly man-made	64.4	38.9
All cotton & chiefly cotton Fabric, n.s.k.	30.5	(D)
Children's & infants' coats, exc. coat & legging sets, total	100.0	100.0
By fabric:		
All man-made & chiefly man-made	44.3	45.0
All wool & chiefly wool	2.1	5.9
All cotton & chiefly cotton Fabric, n.s.k.	53.6	49.1
Girls', children's & infants' jackets, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	5.9	5.2
All man-made & chiefly man-made	85.4	83.8
All wool & chiefly wool All other fabric	1.1	1.3
Fabric, n.s.k.	7.8	9.6
Girls', children's & infants' suits, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	16.1	17.9
All man-made & chiefly man-made	73.0	82.1
All other fabric Fabric, n.s.k.	10.9	--
Girls', children's & infants' skirts, total	100.0	100.0
By construction:		
Woven fabric	57.1	64.0
Knit fabric	10.1	7.8
Construction, n.s.k.	32.8	28.2

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981

(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', children's & infants' skirts (cont'd.)		
By fabric:		
All cotton & chiefly cotton	19.8%	22.5%
All man-made & chiefly man-made	60.5	67.9
All wool & chiefly wool Fabric, n.s.k.	19.7	9.6
Girls', sub-teen & teenage girls' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	77.4	72.9
Knit fabric	2.9	5.0
Construction, n.s.k.	19.7	22.1
By fabric:		
All cotton & chiefly cotton	24.6	24.5
All man-made & chiefly man-made	57.7	53.5
All wool & chiefly wool Fabric, n.s.k.	17.8	22.0
Children's & infants' slacks, incl. jean-cut casual slacks, total	100.0	100.0
By construction:		
Woven fabric	73.6	80.3
Knit fabric	20.7	18.2
Construction, n.s.k.	5.7	1.5
By fabric:		
All cotton & chiefly cotton	39.0	42.1
All man-made & chiefly man-made	54.9	57.0
All wool & chiefly wool All other fabric Fabric, n.s.k.	6.1	0.9
Girls', sub-teen & teenage girls' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	62.8	61.7
All man-made & chiefly man-made	25.9	28.5
Fabric, n.s.k.	11.3	9.8
Children's & infants' jeans & dungarees, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	41.7	52.0
All man-made & chiefly man-made	48.9	36.9
Fabric, n.s.k.	9.5	11.1

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981

(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', sub-teen & teenage girls' shorts, total	100.0%	100.0%
By fabric:		
All cotton & chiefly cotton	14.7	6.2
All man-made & chiefly man-made	74.9	85.3
Fabric, n.s.k.	10.4	8.5
Children's & infants' shorts, total	100.0	100.0
By construction:		
Woven fabric	56.9	58.7
Knit fabric	39.9	39.2
Construction, n.s.k.	3.2	2.1
By fabric:		
All cotton & chiefly cotton	30.2	31.1
All man-made & chiefly man-made	64.9	65.8
All other fabric Fabric, n.s.k.	4.9	3.1
Children's playgarments, incl. playsuits & halter tops, total	100.0	100.0
By construction:		
Woven fabric	51.2	72.2
Knit fabric	29.5	22.7
Construction, n.s.k.	19.3	5.1
By fabric:		
All cotton & chiefly cotton	59.5	64.3
All man-made & chiefly man-made	21.8	32.7
Fabric, n.s.k.	18.7	3.0
Infants' & toddlers' playgarments, incl. creepers and rompers, total	100.0	100.0
By construction:		
Woven fabric	41.7	45.7
Knit fabric	52.1	51.5
Construction, n.s.k.	6.2	2.8
By fabric:		
All cotton & chiefly cotton	27.3	23.3
All man-made & chiefly man-made	65.7	73.3
All other fabric Fabric, n.s.k.	6.9	3.4

(continued)

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981
(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls', infants' & children's swimsuits, total	100.0%	100.0%
By construction:		
Woven fabric	19.7	23.2
Knit fabric	80.3	76.8
By fabric		
All cotton & chiefly cotton	0.9	0.9
All man-made & chiefly man-made	96.9	91.6
Fabric, n.s.k.	2.2	7.5
Girls' & children's panties, incl. pettipants, total	100.0	100.0
By construction:		
Woven fabric	9.8	6.6
Knit fabric	90.2	93.4
By fabric:		
All cotton & chiefly cotton	64.9	60.3
All man-made & chiefly man-made	33.5	35.0
Fabric, n.s.k.	1.6	4.7
Girls' & children's slips, vests & undershirts, total	100.0	100.0
By construction:		
Woven fabric	10.9	10.5
Knit fabric	81.3	89.5
Construction, n.s.k.	7.8	--
By fabric:		
All cotton & chiefly cotton	29.6	44.1
All man-made & chiefly man-made	62.6	55.9
Fabric, n.s.k.	7.8	--
Infants' & toddlers slips, vests undershirts & other underwear, exc. panties, total	100.0	100.0
By fabric:		
All cotton & chiefly cotton	87.6	90.4
All man-made & chiefly man-made Fabric, n.s.k.	13.3	9.6
Girls' & children's pajamas incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	15.5	10.9
Knit fabric	72.7	89.1
Construction, n.s.k.	11.8	--

PRODUCTION

Children's & Girls' Wear

Production of Children's & Girls' Wear by Fabric & Construction, 1980, 1981

(Percent Distribution)
(continued)

	Percent	
	1981	1980
Girls' & children's pajamas (cont'd.)		
By fabric:		
All cotton & chiefly cotton	88.2%	100.0%
All man-made & chiefly man-made Fabric, n.s.k.	11.8	--
Girls' & children's nightgowns, total	100.0	100.0
By construction:		
Woven fabric	26.0	40.6
Knit fabric	64.4	59.4
Construction, n.s.k.	9.6	--
By fabric:		
All cotton & chiefly cotton	90.4	100.0
All man-made & chiefly man-made Fabric, n.s.k.	9.6	--
Infants' & toddlers' nightgowns, total	100.0	100.0
By construction:		
Woven fabric	16.9	4.5
Knit fabric	83.1	95.5
Infants' & toddlers' pajamas, incl. heavyweight sleeping garments with feet, total	100.0	100.0
By construction:		
Woven fabric	3.1	2.6
Knit fabric	78.5	97.4
Construction, n.s.k.	18.4	--
By fabric:		
All cotton & chiefly cotton	0.4	1.7
All man-made & chiefly man-made	76.2	80.3
All other fabric Fabric, n.s.k.	23.4	17.9

n.s.k. = not specified by kind.
(D) = withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

Boys' Wear

As in the children's and girls' categories, the U.S. Census Bureau added a number of manufacturers to their annual surveys which make the basis for production figures reported in the Current Industrial Reports series. However, the effect of these new companies on the final results were only minimal and, therefore, figures on production of boys' wear are for the most part comparable between 1981 and 1980.

The fastest growing category in the boys' wear industry in 1981 was suits (including casual and uniform). Cuttings rose 18.6%, to 4,007 thousand units, from the previous year's total. Close behind were knit sport shirts and work wear which tied with 13.4% growth rates in the one year period.

The largest declines in 1981 were registered by casual sport coats (-42.4%) and jean-cut casual slacks (-38.5%), according to the Census Bureau.

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981

	(Thous. Units)		% Change	Percent of
	1981	1980	1981/1980	Total 1981
Boys' suits, incl. casual & uniform, total	4,007	3,379	+ 18.6%	100.0%
By fabric:				
All man-made & chiefly man-made	3,592	2,931	+ 22.6	89.6
All wool & chiefly wool	123	193	- 36.3	3.1
All cotton & chiefly cotton All other fabric Fabric, n.s.k.	292	255	+ 14.5	7.3
By construction:				
Woven fabric	3,110	2,594	+ 19.6	77.6
Knit fabric	704	656	+ 7.3	17.6
Construction, n.s.k.	193	129	+ 49.6	4.8
Boys' overcoats, topcoats, & tailored suburban & car coats, incl. uniform, total	489	486	+ 0.6	100.0
By fabric:				
All man-made & chiefly man-made	277	266	+ 4.1	56.6
All other fabric	126	153	- 17.6	25.8
Fabric, n.s.k.	86	67	+ 28.4	17.6
Boys' tailored suit-type dress & sport coats, incl. uniform, total	1,184	1,129	+ 4.9	100.0
By fabric:				
All cotton & chiefly cotton	41	120	- 65.8	3.5
All man-made & chiefly man-made	557	601	- 7.3	47.0
All other fabric	586	408	+ 43.6	49.5
Boys' casual (nontailored) sport coats & jackets, total	242	420	- 42.4	100.0
Boys' separate vests, exc. sweater vests total	511	702	- 27.2	100.0
By fabric:				
All cotton & chiefly cotton	370	403	- 8.2	72.4
All man-made & chiefly man-made	141	234	- 39.7	27.6
All wool & chiefly wool All other fabric Fabric, n.s.k.	--	65	--	--
Boys' dress shirts, incl. uniform, total	10,080	16,284	- 38.1	100.0
By fabric:				
All cotton & chiefly cotton	6,144	5,124	+ 19.9	61.0
All man-made & chiefly man-made	3,192	3,240	- 1.5	31.7
All other fabric Fabric, n.s.k.	744	7,920	- 90.6	7.4

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units) 1981	1980	% Change 1981/1980	Percent of Total 1981
Boys' dress shirts (cont'd.)				
By construction:				
Woven fabric	5,640	7,488	- 24.7%	56.0%
Knit fabric	4,356	2,124	+105.1	43.2
Construction, n.s.k.	84	6,672	- 98.7	0.8
Boys' woven sport shirts, total	14,856	18,276	- 18.7	100.0
By fabric:				
All cotton & chiefly cotton	3,804	5,484	- 30.6	25.6
All man-made & chiefly man-made	10,260	11,832	- 13.3	69.1
All wool & chiefly wool All other fabric Fabric, n.s.k.	792	960	- 17.5	5.3
Boys' knit sport shirts, exc. sweatshirts, total	172,932	152,532	+ 13.4	100.0
By fabric:				
All cotton & chiefly cotton	47,376	45,228	+ 4.7	27.4
All man-made & chiefly man-made	103,332	98,928	+ 4.5	59.8
Fabric, n.s.k.	22,224	8,316	+167.2	12.8
By type:				
Full open front shirts	7,877	6,468	+ 21.8	4.6
Partial front opening	44,004	45,588	- 3.5	25.4
T-shirts made for outerwear, incl. tank tops	106,020	89,184	+ 18.9	61.3
Type, n.s.k.	15,036	11,292	+ 33.2	8.7
Boys' sweaters, incl. sweater vests, knit cardigan & pullovers, total	4,704	*	*	100.0
By fabric:				
All man-made & chiefly man-made	3,252	*	*	69.1
All cotton & chiefly cotton All wool & chiefly wool All other fiber Fabric, n.s.k.	1,452	*	*	30.9
Boys' separate dress & sport trousers, including uniform, total	17,844	17,156	+ 4.0	100.0
Woven fabric:				
All cotton & chiefly cotton	6,084	6,111	- 0.4	34.1
All man-made & chiefly man-made	11,416	10,740	+ 6.3	64.0
Fabric, n.s.k.	263	217	+ 21.2	1.5
Knit fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	63	88	- 28.4	0.4
Fabric, n.s.k.	18	--	--	0.1

(continued)

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units)		% Change	Percent of
	1981	1980	1981/1980	Total 1981
Boys' jeans & dungarees, total	72,879	76,255	- 4.5%	100.0%
By fabric:				
All cotton & chiefly cotton	56,414	66,376	- 15.0	77.4
All man-made & chiefly man-made	15,658	9,879	+ 58.5	21.5
Fabric, n.s.k.	807	--	--	1.1
Boys' jean-cut casual slacks, total	18,883	30,725	- 38.5	100.0
By fabric:				
All cotton & chiefly cotton	11,155	19,059	- 41.5	59.1
All man-made & chiefly man-made	7,728	11,666	- 33.8	40.9
Boys' shorts, exc. athletic, total	10,659	11,318	- 5.8	100.0
By fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	5,239	7,404	- 29.2	49.2
All other fabric	5,420	3,914	- 38.5	50.8
By construction:				
Woven fabric	5,885	6,446	- 8.7	55.2
Knit fabric	4,774	4,872	- 2.0	44.8
Boys' coveralls, overalls, work pants & jumpsuits, total	4,968	4,380	+ 13.4	100.0
By fabric:				
All cotton & chiefly cotton All man-made & chiefly man-made	4,248	4,296	- 1.1	85.5
Fabric, n.s.k.	720	84	+757.1	14.5
Boys' nontailored heavy outer jackets, exc. ski, total	4,992	4,872	+ 2.5	100.0
By fabric:				
All cotton & chiefly cotton	600	576	+ 4.2	12.0
All man-made & chiefly man-made	2,904	2,988	- 2.8	58.2
All wool & chiefly wool All other fabric	192	492	- 61.0	3.8
Fabric, n.s.k.	1,296	816	+ 58.8	26.0
Boys' nontailored light outer jackets, total	4,692	4,740	- 1.0	100.0
By fabric:				
All cotton & chiefly cotton	768	1,104	- 30.4	16.4
All man-made & chiefly man-made	3,120	3,120	--	66.5
All other fabric	804	516	+ 55.8	17.1

(continued)

PRODUCTION

Boys' Wear

Production of Specified Types of Boys' Wear - 1980, 1981
(continued)

	(Thous. Units) 1981	(Thous. Units) 1980	% Change 1981/1980	Percent of Total 1981
Boys' pajamas & other nightwear, exc. robes, total	12,480	17,760	- 29.7%	100.0%
By construction:				
Woven fabric	3,552	9,192	- 61.4	28.5
Knit fabric	8,928	8,568	+ 4.2	71.5
By fabric:				
All cotton & chiefly cotton	3,356	8,448	- 60.3	27.7
All man-made & chiefly man-made	9,024	9,312	- 3.1	72.3
Boys' lightweight knit undershirts with ¼ sleeve, exc. T-shirts made for outerwear, total	62,484	58,092	+ 7.6	100.0
By fabric:				
Cotton/polyester blended fabric	29,640	20,064	+ 47.7	47.4
All cotton & all other cotton blends	32,880	38,028	- 13.5	52.6
Boys' supporter type knit briefs, total	101,100	98,700	+ 2.4	100.0
By fabric:				
Cotton/polyester blended fabric	27,096	22,584	+ 20.0	26.8
All cotton & all other cotton blends	74,004	76,116	- 2.8	73.2

n.s.k. = not specified by kind.

*For 1981 the Census Bureau reported figures on production and shipments of 150 establishments which did not report figures for 1980. Results for the 2 years, therefore, are not exactly comparable. Percent changes on specific product categories are not shown in the above table where 10% or more of 1981 production was accounted for by establishments not reporting data for 1980.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1
Underwear & Nightwear, MA23G(81)-1

MATERIALS CONSUMED IN PRODUCTION

The 1977 Census of Manufactures report on the children's wear industry included the cost of materials consumed or put into production by plants classified in this industry. Following are findings from this report.

MATERIALS CONSUMED IN PRODUCTION

Materials Consumed in the Production of Children's Wear, 1977

	Delivered cost (million $)
Children's dresses & blouses (SIC 2361) total	$ 273.8
Broadwoven fabrics	76.4
Purchased knitted fabrics	69.9
All other materials, supplies & containers	39.1
Materials, containers & supplies, n.s.k.	88.4
Children's suits & coats (SIC 2361), total	67.3
Broadwoven fabrics	21.9
Purchased knitted fabrics	11.3
All other materials, containers & supplies	8.9
Materials, containers & supplies, n.s.k.	25.2
Children's outerwear, n.e.c. (SIC 2369), total	298.6
Broadwoven fabrics	128.8
Purchased knitted fabrics	52.1
All other materials, containers & supplies	52.6
Materials, containers & supplies, n.s.k.	65.1

n.s.k. = not specified by kind.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC-77-1-23C

SHIPMENTS

The latest information on value of shipments of major classifications of children's wear by all manufacturers--both primary and secondary producers--is reported in the Annual Survey of Manufactures, 1980, compiled by the U.S. Bureau of the Census, as summarized in the following table.

An added source of information--the 1983 U.S. Industrial Outlook compiled by the U.S. Bureau of Industrial Economics--estimated the total value of shipments of children's dresses and blouses in 1982 at $1,062 million, gaining almost 8% over the estimate for 1981. The compound annual rate of growth in value of shipments in terms of constant (1972) dollars was reported at 2.0% for the period 1972-1982.

Children's wear classifications (infants', children's, boys', girls') not separately reported by the Census Bureau are combined with data on women's wear and have been included in specific Fact Files on men's or women's wear. The Standard Industrial Code classifications are defined on page 3. However, the following figures cover all producers of the classifications listed, not just manufacturers classified in the specific industry.

Summary of
Value of Shipments by All U.S. Producers
Of Specified Categories of Boys' & Children's Wear - 1979, 1980

	Millions of $		% Change
	1980	1979	1980/1979
Boys' suits, coats & tailored jackets (SIC 23114)	$ 146.0	$ 175.7	- 16.9%
Children's dresses & blouses (SIC 2361)	1,038.1	952.9	+ 8.9
Knit sport shirts	246.7	208.6	+ 18.3
Contract work on dresses & shirts	173.1	156.1	+ 10.9
Dresses & blouses, n.s.k.	618.3	588.3	+ 5.1
Children's coats & suits (SIC 2363)	213.5	217.1	- 1.7
Contract work on coats & suits	25.6	22.2	+ 15.3
Coats, jackets, suits, snowsuits	187.8	194.9	- 3.6
Children's outerwear, n.e.c. (SIC 2369)	877.8	749.2	+ 17.2
Contract work on outerwear, n.e.c.	117.0	105.8	+ 10.6
Girls', children's & infants' outerwear, n.e.c.	760.8	643.4	+ 18.2

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified

Source: U.S. Bureau of the Census, 1980 Annual Survey of Manufactures (M80(AS)-2)

Infants', Children's & Girls' Wear

As previously noted in the Production section of this Fact File, starting with the 1981 Current Industrial Report on women's and children's wear, the Census Bureau broadened its coverage of the industry by adding numerous manufacturers to its annual survey. Since newly added companies were not required to report results for previous years, 1981 Census Bureau data are not strictly comparable with that of 1980.

After adjusting for the addition of the new companies added in 1982, jackets registered the largest increase in the value of its shipments of any major reported category, up 43.2%. Children's and girls' suits registered the second largest gain in shipments with manufacturers reporting that the category accounted for 21.7% more dollar shipments in 1982 than 1981.

The largest decline in shipments registered by any overall category in 1981 was the the coat & legging sets, snowpants sets and ski and snow suits group whose value of shipments in 1981 was 44.7% lower than in 1980.

SHIPMENTS

Infants', Children's & Girls' Wear

Shipments of Specified Types of Infants', Children's & Girls' Wear, 1981

(Millions of Dollars)

	1981	Estimated % Change 1981/1980 (Adjusted)
Dresses, total	$ 476.2	- 0.2%
Girls', sub-teen & teenage	162.2	- 10.8
Children's	207.6	+ 7.4
Infants' & toddlers'	106.4	+ 6.1
Blouses (excluding knit outerwear sport shirts), total	174.6	+ 0.1
Girls', sub-teen & teenage	116.9	- 1.5
Children's, infants' & toddlers'	57.7	+ 3.5
Knit outerwear sport shirts, except sweatshirts, total	398.5	+ 8.9
Girls', sub-teen & teenage	62.0	- 17.0
Children's	227.0	+ 21.4
Infants' & toddlers'	109.5	+ 4.4
Sweatshirts, total	8.6	na
Sweaters	60.7	+ 8.4
Coats, excluding coat & legging sets, total	61.8	+ 0.7
Girls', sub-teen & teenage	33.4	- 8.5
Children's, & infants'	28.4	+ 12.6
Coat & legging sets, snowpants sets & ski & snow suits, total	24.0	- 44.7
Raincoats & raincapes, total	6.7	- 5.6
Jackets	65.7	+ 43.2
Vests	4.6	- 8.0
Suits	30.7	+ 21.7
Skirts	55.2	- 0.8
Slacks, incl. jean-cut casual slacks, total	219.7	+ 5.0
Girls', sub-teen & teenage	96.7	- 10.7
Children's & infants'	123.0	+ 20.0
Jeans & dungarees, total	187.7	+ 11.0
Girls', sub-teen & teenage	68.1	+ 6.9
Children's & infants'	119.6	+ 13.5
Shorts, total	62.7	+ 18.2
Girls', sub-teen & teenage	25.0	+ 34.1
Children's & infants'	37.7	+ 9.7
Playgarments, incl. playsuits & haltertops, total	352.2	+ 2.7
Girls', sub-teen & teenage	14.8	+ 11.3
Children's	91.6	- 2.7
Infants' & toddlers'	245.8	+ 4.1
Swimsuits	46.4	+ 14.3
Panties, incl. pettipants, total	92.2	- 4.9
Girls' & children's	61.9	- 1.9
Infants' & toddlers'	30.3	- 10.4

(continued)

Infants', Children's & Girls' Wear

Shipments of Specified Types of Infants', Children's & Girls' Wear, 1981
(Millions of Dollars)
(continued)

	1981	Estimated % Change 1981/1980 (Adjusted)
Slips, vests & undershirts, total	$ 71.1	- 2.6%
Girls' & children's	31.3	- 5.5
Infants' & toddlers'	40.0	- 0.2
Nightgowns, total	83.4	- 3.0
Girls' & children's	62.9	+ 0.2
Infants' & toddlers'	20.5	- 11.5
Pajamas, incl. heavyweight sleeping garments with feet, total	207.9	- 3.7
Girls' & children's	62.4	- 9.2
Infants' & toddlers'	145.5	- 0.8
Robes, total	23.4	- 1.8

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear, MA-23A-(81)-1,
Underwear & Nightwear MA-23G-(81)-1.

Boys' Wear

Although the Census Bureau also added manufacturers to the CIR covering men's and boys' wear in 1981, the result of this addition was not as dramatic as the addition to the children's wear categories and comparability between 1980 and 1981 was maintained for most categories.

The Census Bureau reports that in 1981 shipments of boy's wear reached $1,938.7 million, well above the total for the previous year. The largest gain in production of boys' wear in 1981 was registered by the lightweight undershirt with $\frac{1}{4}$ sleeve group whose shipments were up 38.2% from their 1980 level. A close second was the nontailored light outer jackets group whose total was up 27.4% during the period.

The largest declines in shipments in 1981 were registered by the casual sport coats and jackets group, off nearly 50% and in the separate vests, excluding sweater vests group which was down 35.4%.

SHIPMENTS

Boys' Wear

Value of Shipments of Boys' Wear Items -- 1980, 1981

	Value of Shipments (Million $) 1981	Value of Shipments (Million $) 1980(r)	% Change 1981/1980**
Boys' wear, total of listed categories*	$ 1,938.7	$ 1,817.7	**
Suits, including casual & uniform	88.3	82.6	+ 6.9%
Overcoats, topcoats, & tailored suburban & car coats, including uniform	9.0	7.5	+ 20.0
Tailored suit-type dress & sport coats, including uniform	30.6	26.4	+ 15.9
Casual (nontailored) sport coats & jackets	3.5	6.9	- 49.3
Separate vests, excluding sweater vests	5.1	7.9	- 35.4
Dress shirts, including uniform	52.1	62.1	- 16.1
Woven sport shirts	81.3	86.3	- 5.8
Knit sport shirts, except sweatshirts	490.2	399.9	+ 22.6
Sweaters including sweater vests, knit cardigans, & pullovers	24.7	14.6	**
Separate dress & sport trousers, including uniform	107.1	95.1	+ 12.6
Jeans & dungarees	506.1	451.0	+ 12.2
Jean-cut casual slacks	158.5	225.0	- 29.5
Shorts, except athletic shorts	29.6	32.3	- 8.3
Nontailored heavy outer jackets except ski	67.4	61.5	+ 9.6
Nontailored light outer jackets	32.4	30.9	+ 4.8
Coveralls, overalls, work pants & jumpsuits	34.9	27.4	+ 27.4
Pajamas & other nightwear, excluding robes	57.1	69.1	- 17.4
Lightweight undershirts with $\frac{1}{4}$ sleeve, excluding T-shirts made for outerwear	75.2	54.4	+ 38.2
Supporter-type knit briefs	85.6	76.8	+ 11.4

* Does not include hosiery or accessories such as hats, scarves, gloves, neckwear, etc., as these items are not covered by the Commerce Department's Apparel report.

** For 1981 the Census Bureau reported figures on production and shipments of 150 establishments which did not report figures for 1980. Results for the 2 years, therefore, are not exactly comparable. Percent changes on specific product categories are not shown in the above table where 10% or more of 1981 production was accounted for by establishments not reporting data for 1980.

(r) revised.

Source: U.S. Department of Commerce,
Bureau of the Census,
Current Industrial Reports,
MA23E(81)-1 / MA23G(81)-1.

PRODUCER PRICES

While producer (factory) prices for all items rose at a 2.0% pace and that of apparel rose 4.2% between 1982 and 1981, two categories of children's wear bucked this trend towards higher prices by registering declines during this period. Boys' sport shirts and children's dresses both recorded lower price indexes in 1982 than they did in 1981.

Producer Price Indexes For Children's Wear 1979 - 1982
(12/77 = 100 unless otherwise noted)

	Annual Averages				% Change	
	1982	1981	1980	1979	1982/1981	1982/1980
All items (1967 = 100)	299.3	293.4	268.8	235.6	+ 2.0%	+ 11.3%
All apparel (1967 = 100)	193.8	186.0	172.4	160.4	+ 4.2	+ 12.4
Boys' wear						
Sport shirts	143.0	144.1	121.1	111.6	- 0.8	+ 18.1
Denim jeans & jean-cut casual slacks (12/81 = 100)	100.5	na	na	na	na	na
Jeans & jean-cut casual slacks, of other fabrics (12/81 = 100)	99.2	na	na	na	na	na
Work clothing, exc. jeans & work shirts (12/81 = 100)	99.9	na	na	na	na	na
Girls', children's & infants' wear (1967 = 100)	196.0	190.8	171.1	159.2	+ 2.6	+ 14.6
Children's sport shirts	151.8	144.1	121.1	111.6	+ 5.3	+ 25.4
Children's dresses	116.1	117.3	108.3	103.5	- 1.0	+ 7.2
Knee socks	137.3	131.4	119.5	109.5	+ 4.5	+ 14.9

na = not available

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

Imports of children's wear represent a sizable chunk of the domestic market. However, statistics are not available as the information is combined in Census Bureau import data with women's wear (covered in total in specific Women's Fact Files) or, in the case of boys' wear combined with men's wear.

The Office of Business Economics has reported the following trend in exports of children's dresses, blouses, coats, suits.

Value of Exports, 1972-1982

	Mil. $
Children's coats, suits, blouses, dresses	
1982	$ 15.2
1981	22.7
1980	23.0
1979	12.4
1972	2.2

Source: U.S. Office of Business Economics, 1983 U.S. Industrial Outlook.

FOREIGN TRADE

Of the 1982 total, children's dresses and blouses (SIC 2361) accounted for $13.4 billion, or 88%.

THE SIZE OF THE MARKET

Births

What has been called the echo birth boom--the babies of the babies of the big boom of the 1950's--has arrived. Last year over 3.7 million children were born 11.3% more than five years earlier and marking the sixth consecutive year in which there has been an increase. The birthrate rose slightly to 16.0 births per 1,000 population in 1982, and the fertility rate also registered an increase, rising to 67.8 from 67.6 in 1981 and comparing with 66.8 in 1977.

The rise in births was to be expected in view of the gains in the number of women in the population of childbearing age. However, the rise has been slower in developing than was expected due primarily to a delay in the age of marriage and delay in the age of childbearing. In 1960, at roughly the crest of the baby boom, of all women aged 20-24, more than 70% were married and almost 55% were mothers. By contrast, of all women of that age in 1980 only half were married and under 40% were mothers.

Part of the rise in the current level of births is due to the fact that older women who had delayed marriage and childbearing in order to pursue their education and careers, are now entering the family formation state. Both marriage and birthrates have been increasing in recent years.

Almost all birth projections assume that the present low fertility level will continue. However, according to the Conference Board, births should rise to about 4.0 million in 1985 and remain fairly stable at that level through the rest of the decade, until it tapers off moderately in the final year or two. This means that within the next few years annual births will be some 27% higher than the low of 3.137 million in 1973, sustained by the size of the population of child-bearing years.

Live Births in the U.S., Birth Rates & Fertility Rates
Selected Years, 1970-1982

Year	Number (thous.)	Birth Rate*	Fertility Rate**
1982(p)	3,704.0	16.0	67.8
1981(p)	3,646.0	15.9	67.6
1980	3,612.3	15.9	68.4
1973	3,137.0	14.8	68.8

(p) provisional
* Live births per 1,000 population
** Live births per 1,000 women 15-44 years of age

Source: U.S. Dept. of Health & Human Services,
National Center for Health Statistics
Monthly Vital Statistics Report

THE SIZE OF THE MARKET

Births

More than 40% of the live births recorded in 1980 were first births, while second births accounted for 31.7%. The rate of first births is particularly important to manufacturers and retailers of children's wear, because recent surveys indicate that retail dollars spent on first borns are about 130% higher than those spent on following offspring.

Total Youth Population

Due to the increase in the birth totals in recent years there has been growth in the number of children under 5 years of age in the U.S. population. The current total is about 17,846,000 representing a gain of 8.5% compared with 1980. Older age segments of the youth population have declined in size but will benefit from increases in current birth levels in the future, as the population ages.

Trends In The Size of The Children's Wear Market, 1970-1983
(Numbers in Thousands)

	1983	1980	1970	Percent Change 1983/1980	Percent Change 1983/1970
Total, 16 & younger	58,747	59,434	65,905	- 1.2%	- 10.9%
Under 5 years	17,846	16,448	17,166	+ 8.5	+ 4.0
5 to 9 years	15,948	16,595	19,919	- 3.9	- 19.9
10 to 14 years	17,755	18,227	20,853	- 2.6	- 14.9
15 to 16 years	7,198	8,164	7,967	- 11.8	- 9.6

Source: U.S. Bureau of the Census
Current Population Reports, P- 25, 917, 922

The U.S. Bureau of the Census has issued an Advance Report on Projections of the Population of the United States: 1982 to 1950, based on alternative assumptions of key trends. The "middle" of three sets of projections looks for a decrease in the population of primary-school age (5 to 13 years) children from 30.7 million in 1981 to 29.6 million in 1985, after which it would increase to 34.4 million by 1995.

The population of secondary-school age (14 to 17 years) would decline from 14.9 million in 1981 to 12.9 million in 1990, before increasing to 15.4 million in 2000.

The U.S. Youth Population (Through Age 16)
1982 & Projections to 2000*

	Number (thousands) 1982	1985	1990	2000	% Change 2000/1982	Percent of Total Population 1982	1985	1990	2000
Total, all ages	231,997	238,648	249,731	267,990	+ 15.5%	100.0%	100.0%	100.0%	100.0%
Youth, 16 years & younger	58,727	59,248	61,013	63,599	+ 8.3	25.3	24.8	24.4	23.7
Male	30,024	30,304	31,217	32,553	+ 8.4	12.9	12.7	12.5	12.1
Female	28,703	28,944	29,796	31,049	+ 8.2	12.4	12.1	11.9	11.6

(continued)

THE SIZE OF THE MARKET

Total Youth Population

The U.S. Youth Population (Through Age 16)
1982 & Projections to 2000*
(continued)

	Number (thousands)				% Change	Percent of Total Population			
	1982	1985	1990	2000	2000/1982	1982	1985	1990	2000
Under 5 years	17,370	18,462	19,200	17,624	+ 1.5%	7.5%	7.7%	7.7%	6.6%
Male	8,888	9,453	9,831	9,024	+ 1.5	3.8	4.0	3.9	3.4
Female	8,482	9,009	9,369	8,061	+ 1.4	3.7	3.8	3.8	3.2
5 to 9 years	15,945	16,595	18,599	18,758	+ 17.6	6.9	7.0	7.4	7.0
Male	8,153	8,484	9,519	9,601	+ 17.8	3.5	3.6	3.8	3.6
Female	7,791	8,110	9,080	9,157	+ 17.5	3.4	3.4	3.6	3.4
10 to 14 years	18,014	16,785	16,776	19,519	+ 8.4	7.8	7.0	6.7	7.3
Male	9,208	8,584	8,576	9,989	+ 8.5	4.0	3.6	3.4	3.7
Female	8,806	8,201	8,200	9,530	+ 8.2	3.8	3.4	3.3	3.6
15 & 16 years	7,398	7,406	6,438	7,698	+ 4.1	3.2	3.1	2.6	2.9
Male	3,775	3,783	3,291	3,939	+ 4.3	1.6	1.6	1.3	1.5
Female	3,623	3,624	3,147	3,761	+ 3.8	1.6	1.5	1.3	1.4

* Representing the middle in a series of three projections compiled by the Census Bureau, based on varying assumptions on future trends in fertility, mortality and immigration.

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 922 (October 1982)

The Youth Population of the U.S.
By Single Years of Age & By Sex, 1982 & 1990 Projections

(Numbers in Thousands)

	1982 Total			1990 Total*		
	Total	Male	Female	Total	Male	Female
Youth, 16 years & younger, total	58,727	30,024	28,703	61,013	31,217	29,796
Under 5 years	17,370	8,888	8,482	19,200	9,831	9,369
Under 1 year	3,649	1,869	1,780	3,832	1,963	1,869
1 year	3,591	1,839	1,752	3,848	1,970	1,877
2 years	3,553	1,817	1,736	3,852	1,972	1,880
3 years	3,354	1,715	1,639	3,843	1,968	1,876
4 years	3,223	1,648	1,575	3,825	1,958	1,867
5 to 9 years	15,945	8,153	7,791	18,599	9,519	9,080
5 years	3,239	1,657	1,582	3,797	1,944	1,853
6 years	3,134	1,601	1,533	3,760	1,925	1,836
7 years	3,195	1,634	1,561	3,717	1,902	1,814
8 years	3,125	1,598	1,527	3,688	1,888	1,801
9 years	3,251	1,662	1,589	3,637	1,861	1,776
10 to 14 years	18,014	9,208	8,806	16,776	8,576	8,200
10 years	3,374	1,725	1,648	3,603	1,842	1,761
11 years	3,728	1,907	1,821	3,407	1,742	1,665
12 years	3,731	1,907	1,824	3,278	1,676	1,602
13 years	3,634	1,855	1,778	3,296	1,686	1,610
14 years	3,547	1,812	1,735	3,193	1,631	1,562
15 & 16 years	7,398	3,775	3,623	19,200	9,831	9,369
15 years	3,638	1,857	1,781	3,254	1,664	1,591
16 years	3,760	1,918	1,842	3,184	1,627	1,556

* Middle series projections.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 922 (October 1982)

THE SIZE OF THE MARKET

U.S. Family Size Based on Number of Children Under 18: 1979 & 1981
(Numbers in Thousands)

	1981	1979	% Change 1981/1979	% of Total 1981
All families, total	60,309	57,804	+ 4.3%	100.0%
No children under 18	29,082	27,433	+ 6.0	46.6
With children under 18	31,227	30,371	+ 2.8	51.8
1 child under 18	12,745	11,882	+ 7.3	21.1
2 children under 18	11,592	11,005	+ 5.3	19.2
3 children under 18	4,616	4,913	- 6.0	7.7
4 children under 18	1,563	1,745	- 10.4	2.6
5 children under 18	460	549	- 16.2	0.8
6 or more children under 18	251	249	+ 0.8	0.4
No children under 6	46,762	44,801	+ 4.4	77.5
With children under 6	13,637	13,003	+ 4.9	22.6
1 child under 6	9,358	9,053	+ 3.4	15.5
2 children under 6	3,649	3,449	+ 5.8	6.1
3 children under 6	569	438	+ 29.9	0.9
4 or more children under 6	61	63	- 3.1	0.1
No children under 3	52,030	50,008	+ 4.0	86.3
With children under 3	8,279	7,796	+ 6.2	13.7
1 child under 3	7,283	6,857	+ 6.2	12.1
2 children under 3	963	898	+ 7.2	1.6
3 or more children under 3	34	41	- 17.1	0.1

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 371 (May 1982).

More than 20% of the population under 18 years old lived with only one parent in 1981 up from 11.9% recorded in 1970, with nearly 90% of these living with their mothers. Although the total number of children under 18 years has declined by 9% in this eleven year period, the total number living with one parent has increased by 54% to a total of 12.6 million.

Of single parent households, the fastest growing since 1971 have been those led by males, whose numbers have increased by 61%, although they account for only a small proportion of the total (only 10%). In 1981, 20.1% of children under 18 years of age were living with only one parent compared with 11.9% in 1970--most of these were with their mothers who were likely to be divorced or separated from their husbands.

THE SIZE OF THE MARKET

Living Arrangements of Persons Under 18 Years Old: 1970 & 1981

(Excludes persons under 18 years old who were maintaining families or sub-families)
(Numbers in Thousands)

	All Races			% of Total	
	1981	1970	% Change 1981/1970	1981	1970
Living arrangements					
Children under 18	62,918	69,162	- 0.9%	100.0%	100.0%
Living with --					
Two parents	48,040	58,939	- 18.5	76.3	85.2
One parent	12,619	8,199	+ 53.9	20.1	11.9
Mother only	11,416	7,451	+ 53.2	18.1	10.8
Divorced	4,912	2,296	+113.9	7.8	3.3
Married	3,540	3,234	+ 9.5	5.6	4.7
Separated	3,112	2,332	+ 33.4	4.9	3.4
Widowed	1,158	1,395	- 17.0	1.8	2.0
Single (never married)	1,807	527	+242.9	2.9	0.8
Father only	1,203	748	+ 60.8	1.9	1.1
Divorced	614	177	+246.9	1.0	0.3
Married	296	287	+ 3.1	0.5	0.4
Separated	261	152	+ 71.7	0.4	0.2
Widowed	181	254	- 28.7	0.3	0.4
Single (never married)	112	30	+273.3	0.2	*
Other relatives only	1,911	1,547	+ 23.5	3.0	2.2
Nonrelatives only	348	477	- 27.0	0.6	0.7

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-20, No. 374

RETAIL SALES

Analysts estimate that the children's wear market in 1982 registered sales of between $14 billion and $15 billion. Recessionary pressures in 1982 were blamed by many retailers for the sub-par growth rate that the industry registered in that year.

Most retailers see no major upswing in children's wear sales in 1983 (Women's Wear Daily, January 3, 1983), although some manufacturers are planning on increases of between 10% and 15% through the fall, predicated on a strong recovery from the recession which stalled consumer spending over the last two years.

Even though the industry has been holding stable since the recession started in 1981, there have been a few bright categories for retailers, including infants' wear, licensed products, (particularly for boys) and girls' dresses. Analysts see the growth of these areas continuing for the near future due to the "baby boomlet" now underway and the increased purchasing power of the now quite common "dual income family."

RETAIL SALES

There was a marked trend away from designer jeans back to basic jeans, and greater demand for basic sweatshirts, shorts and pants for kids in 1982 and early 1983. Activewear also grew in importance, with the influence of the fitness boom making itself felt down to apparel for very small children. The boys' wear market has become increasingly a status, brand conscious market and retailers are identifying with this trend.

RETAIL SALES BY STORE TYPE

A new type of children's wear retailer--the branded outlet or off-price retailer of branded lines--has emerged and is expected to have a growing impact on the market in coming years. They will be a challenge to the established discounters and mass merchandisers, who in the past took a major share of the children's wear market away from department stores and specialty stores.

Data on place of purchase is collected through consumer panel operations which track purchases through diaries maintained by panel members, and findings of this type are covered in the Buying Habits section of this Fact File. The only official information on sales by merchandise line, however, is that compiled by the U.S. Census Bureau in the 1977 Census of Retail Trade. (The next such census will cover data for 1982).

Census information, as noted below, cover stores with payrolls and included are certain types of retailers (drug stores, supermarkets, etc.) which were not required to break out apparel sales--resulting in an understatement of the total market to an extent which varies by type of merchandise.

In addition, store classifications are broad. For example, department stores include discount stores and the retail outlets operated by mail order chains which meet the definition of a department store based on merchandise carried and size. However, the following tables from the census will provide a broad outline of market share by store type.

Infants' Wear

Department stores (which include department stores operated by mail order chains, as well as discount department stores) accounted for nearly 65% of reported sales of infants' and toddlers' wear in 1977, while representing only 25% of stores reporting sales in this category. Children's wear stores had the second highest total of sales of infants' and toddlers' wear sales in that same year, but represented only 13.7% of the industries total retail volume.

Retail Sales of Infants' & Children's Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Store types reporting sales of infants'/children's wear, total*	35,087	100.0%	$2,537.6	100.0%
Department stores	8,732	24.9	1,629.8	64.2
Women's ready-to-wear stores	5,475	15.6	190.0	7.5

(continued)

RETAIL SALES BY STORE TYPE

Infants' Wear

Retail Sales of Infants' & Children's Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)
(continued)

	Stores		Sales	
	No.	%	Mil. $	%
Family clothing stores	8,925	25.4%	$ 256.1	10.1
Shoe stores	4,108	11.7	41.6	1.6
Children's wear stores	4,225	12.0	346.4	13.7
Non-store retailers:				
Mail order houses (catalog sales)	3,622	10.3	73.7	2.9

* Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

Source: U.S. Bureau of the Census, 1977
Census of Retail Trade, RC77-L.

Girls'/Sub-teens' Wear

Of the close to $2 billion in reported sales of girls' and sub-teens' wear in 1977, department stores accounted for close to 64%, while representing about 27% of the total number of retail outlets covered in the Census reports.

Retail Sales of Girls' & Sub-teens' Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Store types reporting sales of girls'/sub-teens' wear, total*	30,678	100.0%	$1,939.8	100.0%
Department stores	8,191	26.7	1,239.2	63.9
Women's ready-to-wear stores	6,167	20.0	224.2	11.6
Family clothing stores	8,952	29.2	251.7	13.0
Men's wear stores	477	1.5	5.4	0.3
Shoe stores	55	0.2	0.1	#
Children's wear stores	3,239	10.6	168.8	8.7
Non-store retailers:				
Mail order houses (catalog sales)	3,597	11.7	50.4	2.6

* Total represents sales reported for the store types listed above. Not all types of stores selling women's and children's wear broke out merchandise line sales data in reports to the Census Bureau. However, the above reflects the total sales in the major types of outlets handling each category.

# = Less than 0.1%

Source: U.S. Bureau of the Census, 1977,
Census of Retail Trade, RC77-L.

RETAIL SALES BY STORE TYPE

Boys'/Young Men's Wear

Boys' wear sales in 1977 registered $3.9 billion with seven out of every ten of these dollars being spent in department stores. Meanwhile department stores accounted for only 25.6% of the 33,554 stores reporting sales. Family clothing stores registered a distant second to department stores in sales ringing up 11.2% of the total volume.

Retail Sales of Boys' Wear
By Type of Retail Outlet, 1977
(Includes only stores with payroll)

	Stores		Sales	
	No.	%	Mil. $	%
Total*	33,554	100.0%	$3,898.1	100.0%
Department stores	8,575	25.6	2,737.9	70.2
Men's, boys' wear stores	5,880	17.5	378.7	9.7
Women's ready-to-wear stores	2,654	7.9	104.5	2.7
Family clothing stores	9,886	29.5	436.8	11.2
Children's wear stores	2,966	8.8	148.4	3.8
Non-store retailers:				
Mail order houses	3,593	10.7	91.8	2.4

* Includes boys' sizes 2 to 16, young men's sizes 13 to 20 and student's sizes 32 to 44, clothing, furnishings and accessories.
Total covers stores which reported sales of the specific merchandise category. Not all types of stores broke out sales in this detail. However, the above reflects sales in the major outlet types.

Source: U.S. Bureau of the Census, 1977,
Census of Retail Trade, RC77-L.

Department Stores

Department Stores: Number of Stores & Total Sales 1979-1982

	1982	1981	1980	1979	% Change 1982/1981	% Change 1981/1980
Number of Stores	na	na	9,240	9,013	na	na
Total Sales (Mil. $)	$107,030	$103,672	$96,345	$89,155	+ 3.2%	+ 11.1%

na = not available

According to the National Retail Merchants Association, every measured category of girls' and boys' wear in department stores registered increases in sales in 1981, the largest coming in the boys' furnishings group, up 11.0% above the previous year.

Every measured category of boys' wear recorded a higher gross margin in 1981 than any girls' wear group, while markdowns on boys' wear were consistently lower than those registered for girls' wear.

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results in Girls' Wear Departments In Department Stores With Total Annual Sales Over $1 Million, 1981

(Typical Results)

	Girls' Clothing By Size Group				
	Sizes 3 to 6X	7 to 14	6 to 16 or 8 to 14	Apparel Accessories	Intimate Apparel
Net sales, % change from last year	+ 7.8%	+ 11.8%	+ 10.9%	+ 10.6%	+ 2.1%
Sales, % of merchandise division	6.7	14.6	5.2	7.8	4.4
Sales, % of total store sales	0.5	1.0	0.4	0.7	0.3
$ sales per square foot of selling space	$ 75.0	$ 96.5	$ 49.7	$ 91.0	$ 61.8
Cumulative markon, %	50.3%	50.7%	50.9%	50.2%	49.6%
Gross margin, % of sales incl. cash discounts	45.2	46.9	44.2	45.8	44.0
Markdowns, retail, % of sales	17.2	15.7	18.9	10.1	14.6
Returns, % of sales	8.3	9.0	10.1	2.8	4.1
Number of stock turns	3.6	3.9	3.2	2.5	2.7
Salespeople's salaries, % of sales	7.5	7.7	7.3	7.3	8.0
Sales promotions, % of sales	4.0	3.1	3.5	2.2	3.6

Merchandising & Operating Results in Boys' Wear Departments In Department Stores With Total Annual Sales Over $1 Million, 1981

(Typical Results)

	Boys' Clothing by Size Group			
	Size 2 to 6X or 8	4 to 12 or 4 to 16	13 to 20 & 32 to 44	Boys' Furnishings (All Ages)
Net sales, % change from last year	+ 7.7%	+ 4.9%	+ 6.2%	+ 11.0%
Sales, % of merchandise division	6.5	12.5	22.5	14.0
Sales, % of total store sales	0.5	1.0	2.0	0.9
$ sales per square foot of selling space	$ 75.0	$ 89.1	$104.3	$ 95.4
Cumulative markon, %	49.0%	48.5%	48.1%	49.6%
Gross margin, % of sales incl. cash discounts	43.1	40.0	38.9	44.7
Markdowns, retail, % of sales	13.8	14.6	14.2	10.8
Returns, % of sales	7.0	8.6	9.3	6.9
Number of stock turns	3.1	2.6	3.0	2.7
Salespeople's salaries, % of sales	7.2	7.6	6.1	7.4
Sales promotions, % of sales	4.1	3.3	2.7	3.9

Source: National Retail Merchants Association, Merchandising and Operating Results of 1981, (1982 Edition).

RETAIL SALES BY STORE TYPE

Seasonal Pattern

Percent of Years' Total Sales by Month
In Infants' & Children's Wear Departments
(Five Year Average)

Month	Infants' Wear	Girls' Wear	Boys' Wear
January	5.3%	3.7%	4.1%
February	5.5	4.6	4.7
March	8.6	9.1	8.0
April	7.9	7.6	7.9
May	6.2	6.1	6.3
June	5.9	5.8	6.4
July	5.9	5.8	5.4
August	8.4	11.7	10.5
September	9.2	9.0	9.0
October	9.3	8.9	8.2
November	11.3	11.1	10.8
December	16.5	16.6	18.7

Source: Newspaper Advertising Bureau
Covering 1981-1965 indexes.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage, 1981

	Girls' Sportswear & Accessories	Boys' Outer Apparel	Girls' & Teens' Dresses
January	3.4%	3.5%	1.5%
February	5.9	4.4	2.7
March	6.7	5.9	8.8
April	8.8	15.1	24.9
May	6.5	3.7	4.8
June	5.1	1.8	4.7
July	8.0	6.1	7.9
August	23.0	23.7	24.5
September	5.8	6.9	3.3
October	7.8	8.4	2.4
November	9.3	10.0	4.3
December	9.7	10.5	10.2
Total linage	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc. -- Neustadt Reports Div. (based on retail newspaper advertising linage in seven markets: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington D.C.) 1983 Newspaper Planbook.

CONSUMER PRICES

Consumer prices for all measured categories of boys' wear rose at a much slower rate in 1982 than the rate of the all items category. The only category to register an increase greater than that recorded by the total apparel group (2.5%) was furnishings whose prices were up 6.9%.

The boys' coats, jackets, sweaters & shirts group actually recorded a lower price index in 1982 than in 1981, as the index fell 0.1% to 104.7 during the period.

In March 1983, the U.S. Department of Labor reported (Daily News Record 3/24/83) that consumer prices in February 1983 were unchanged from their January level although they were 3.5% higher than the level recorded in February 1982. Reported price increases by boys' wear categories ranged from 2.1% to 3.4% higher in February 1983, when compared with the year earlier period. Increases for girls' wear ranged from a decrease of 1.8% for separates and sportswear to an increase of 6.6% for nightwear and hosiery during the same period.

Consumer Price Indexes for Specified Children's Wear Items, 1979-1982
(Dec. 1977 = 100, unless otherwise indicated)

	Annual Averages				% Change	
	1982	1981	1980	1979	1982/1981	1982/1980
All Items (1967 = 100)	282.5	260.5	233.2	204.7	+ 8.4%	+ 21.1%
Apparel (1967 = 100)	177.0	172.6	164.3	155.8	+ 2.5	+ 7.7
Boys' wear	114.6	112.0	105.6	99.9	+ 2.3	+ 8.5
Furnishings	127.3	119.1	111.5	105.8	+ 6.9	+ 14.2
Suits, trousers, sportcoats & jackets	117.2	114.8	108.2	102.9	+ 2.1	+ 8.3
Coats, jackets, sweaters & shirts	104.7	104.8	99.3	93.2	- 0.1	+ 5.4

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Infants' Wear

In January 1980, American Baby Magazine conducted a small survey among both expectant and new mothers to determine their preferences, purchases and ownership of infants' wear. Returns from 1,200 mothers, representative of the magazines circulation were used to form the basis for the survey.

This survey revealed that among expectant mothers the most commonly owned piece of infants' apparel was sleepwear with nearly three out of four respondents reporting that they had acquired this item. The least frequently owned item was reported to be soft sole shoes, as only 32.3% of the respondents stated that they had acquired through any means.

CONSUMER BUYING HABITS

Infants' Wear

Acquisition of Infants' Wear by Expectant Mothers

	Acquired	Received as a Gift	Bought in last 6 months	Acquired through other means
Total respondents	600	600	600	600
Percent	100.0%	100.0%	100.0%	100.0%
Underwear	58.5	23.3	26.0	9.2
Sleepwear	74.7	42.2	31.5	1.0
Waterproof pants	48.8	17.7	26.7	4.4
Suits/dresses	38.7	21.3	13.0	4.4
Sacque sets	49.7	28.3	15.0	6.4
Shirts	48.0	21.3	19.7	7.0
Outerwear	48.8	24.3	14.2	10.3
Cloth/plastic bibs	59.5	30.7	20.3	8.5
Soft sole shoes	32.3	14.5	11.5	6.3

Source: American Baby Magazine,
The Market For Infants' Clothing.

Among new mothers, sleepwear garnered first place in ownership while hard sole shoes received the fewest number of mentions as an item of infants' apparel which had been acquired within the last six months.

Purchases of Infants' Wear by New Mothers & by Age of Child

	Total	With a Child Aged Less Than 3 Months	With a Child Aged 3 to 6 Months
Total respondents	600	318	282
Percent:	100.0%	100.0%	100.0%
Underwear	54.5	54.1	55.0
Waterproof pants	52.5	53.1	51.8
Sleepwear	76.8	74.5	79.4
Outerwear	30.8	26.7	35.5
Suits/dresses	37.8	32.7	43.6
Jeans/slacks	27.0	16.7	38.7
Plastic bibs	17.2	13.2	21.6
Cloth bibs	31.2	26.4	36.5
Shirts	34.2	22.0	47.9
Soft sole shoes	24.7	15.1	35.5
Hard sole shoes	4.2	3.8	4.6

Source: American Baby Magazine,
The Market For Infants' Wear.

CONSUMER BUYING HABITS

Infants' Wear

The following information on boys' & girls' wear purchases has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing and Research Companies, Port Washington, N.Y. The data are based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "girls" includes girls 13 years old and younger, while "boys" includes those 16 and younger.)

Boys' Wear

Distribution of Reported Boys' Wear Purchases by Type of Retail Outlet, 1982
(Percent of Units Purchased)

	Sport Coats	Suits
National chains	28.0%	44.5%
Department stores	31.5	20.8
Discount stores, incl. K mart	19.4	19.4
Specialty stores	11.6	13.9
Other store types	9.5	1.5

Distribution of Boys' Wear Purchases by Price Points, 1982
(Percent of Units Purchased)

	Sport Coats	Suits
Less than $18.00	10.3%	13.7%
$18.00 - $25.99	26.3	12.2
$26.00 - $33.99	15.4	19.2
$34.00 - $41.99	12.1	13.4
$42.00 - $55.99	17.6	12.2
$56.00 & over	18.3	29.2

Distribution of Boys' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All-Weather Coats	Raincoats
National chains	28.2%	28.4%	31.2%
Department stores	18.3	12.1	15.0
Discount stores & K mart	31.4	28.0	33.0
Specialty stores	11.3	22.7	5.4
Other store types	10.8	8.8	15.4

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Coat Purchases by Price Point, 1982
(Percent of Units Purchased)

	Jackets	All-Weather Coats
Less than $10.00	25.5%	10.5%
$10.00 - $19.99	35.7	24.1
$20.00 - $29.99	23.9	32.8
$30.00 - $39.99	8.2	7.9
$40.00 & over	6.7	24.7

	Raincoats
Less than $4.00	34.8%
$4.00 - $7.99	45.6
$8.00 - $19.99	17.2
$20.00 & over	2.4

Distribution of Boys' Pants Purchases by Store Type, 1982
(Percent of Units Purchased)

	Corduroy Jeans	Denim Jeans	Corduroy Slacks	Non-corduroy Slacks
National chains	25.6%	31.0%	24.4%	24.8%
Department stores	22.9	17.0	18.8	22.8
Discounters, incl. K mart	18.8	30.4	32.4	29.7
Specialty stores	23.6	13.4	19.6	16.3
Other store types	8.2	8.2	4.8	6.4

Distribution of Boys' Pants Purchases by Price Point, 1982
(Percent of Units Purchased)

	Corduroy Jeans	Denim Jeans	Corduroy Slacks	Non-corduroy Slacks
Less than $6.00	14.0%	23.3%	30.3%	26.8%
$6.00 - $9.99	30.5	33.3	35.0	27.6
$10.00 - $13.99	31.5	23.4	22.4	22.9
$14.00 - $17.99	18.4	14.3	8.6	13.4
$18.00 & over	5.6	5.7	3.7	9.3

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Underwear/Loungewear Purchases by Store Type, 1982
(Percent of Units Purchased)

	Undershorts	Undershirts	Pajamas/ Sleepwear Sets	Robes
National chains	26.4%	26.4%	38.5%	35.5%
Department stores	13.8	11.0	16.2	17.2
Discounters, incl. K mart	43.1	43.2	33.6	39.1
Specialty stores	4.1	6.2	5.7	5.1
Other store types	12.6	13.2	6.0	3.1

Distribution of Boys' Underwear Purchases by Price Point, 1982
(Percent of Units Purchased)

	Undershorts	Undershirts
Less than $1.00	25.5%	24.9%
$1.00 - $1.49	42.3	31.2
$1.50 - $1.99	23.0	24.6
$2.00 - $2.49	5.0	8.1
$2.50 or more	4.2	11.2

Distribution of Boys' Loungewear Purchases by Price Point, 1982
(Percent of Units Purchased)

	Pajamas/ Sleepwear		Robes
Less than $3.00	17.8%	Less than $6.00	16.4%
$3.00 - $4.99	27.6	$6.00 - $9.99	23.4
$5.00 - $6.99	17.9	$10.00 - $13.99	37.7
$7.00 - $8.99	21.3	$14.00 - $17.99	17.7
$9.00 & over	15.4	$18.00 & over	4.9

Distribution of Boys' Shirt/Sweater Purchases by Store Type, 1982
(Percent of Units Purchased)

	Sweatshirts	Polo Shirts	Sport Shirts	Dress Shirts	Sweaters
National chains	21.2%	23.8%	25.3%	23.7%	21.8%
Department stores	16.6	19.9	20.7	18.4	28.2
Discount store, incl. K mart	42.1	34.0	33.4	36.1	29.1
Specialty stores	9.2	11.9	11.2	13.0	12.0
Other store types	10.9	10.4	9.4	8.8	8.9

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Boys' Wear

Distribution of Boys' Shirt Purchases by Price Point, 1982
(Percent of Units Purchased)

	Sweatshirts	Polo Shirts	Sport Shirts	Dress Shirts
Less than $5.00	31.0%	55.7%	39.7%	35.0%
$5.00 - $8.99	39.5	30.5	38.2	39.1
$9.00 - $12.99	23.7	8.9	15.5	18.0
$13.00 & over	5.8	4.9	6.6	7.9

Distribution of Sweater Purchases by Price Point, 1982
(Percent of Units Purchased)

	Sweaters
Less than $6.00	22.0%
$6.00 - $7.99	20.5
$8.00 - $11.99	29.2
$12.00 - $15.99	16.7
$16.00 & over	11.6

Girls' Wear

Distribution of Girls' Dress/Skirt Purchases by Store Type, 1982
(Percent of Units Purchased)

	Dresses	Skirts
National chains	16.9%	24.0%
Department stores	32.6	22.1
Discount Stores, incl. K mart	25.2	29.4
Specialty stores	17.5	17.5
All other store types	7.8	7.0

Distribution of Girls' Dress/Skirt Purchases by Price Point, 1982
(Percent of Units Purchased)

Skirts	Percent	Dresses	Percent
Less than $6.00	17.9%	Less than $8.00	32.5%
$6.00 - $7.99	20.1	$8.00 - $11.99	23.6
$8.00 - $11.99	28.7	$12.00 - $15.99	18.5
$12.00 - $15.99	19.8	$16.00 - $19.99	10.5
$16.00 - $19.99	8.3	$20.00 - $29.99	10.7
$20.00 & over	5.3	$30.00 & over	4.2

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Girls' Wear

Distribution of Girls' Tops by Type of Outlet, 1982
(Percent of Units Purchased)

	Shirts/ Blouses	Other Tops	Sweatshirts	Sweaters
National chains	23.6%	28.5%	23.7%	21.9%
Department stores	21.6	19.2	14.6	23.1
Discount stores, incl. K mart	29.0	34.7	32.3	29.8
Specialty stores	18.6	14.4	14.8	17.5
All other store types	7.2	3.2	14.6	7.7

Distribution of Girls' Tops by Price Point, 1982
(Percent of Units Purchased)

Shirts/Blouses

	Percent
Less than $3.00	15.1%
$3.00 - $4.99	19.1
$5.00 - $6.99	21.4
$7.00 - $10.99	28.2
$11.00 - $14.99	10.6
$15.00 & over	5.6

Other Tops

	Percent
Less than $3.00	33.8%
$3.00 - $4.99	30.3
$5.00 - $6.99	18.7
$7.00 - $9.99	10.4
$10.00 & over	6.8

Sweatshirts

	Percent
Less than $3.00	4.0%
$3.00 - $4.99	14.5
$5.00 - $6.99	23.9
$7.00 - $10.99	35.5
$11.00 - $14.99	17.4
$15.00 & over	4.7

Sweaters

	Percent
Less than $6.00	26.3%
$6.00 - $9.99	37.1
$10.00 - $13.99	22.2
$14.00 - $19.99	10.4
$20.00 & over	4.0

Distribution of Girls' Coat Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Jackets	All Weather Coats	Raincoats
National chains	22.9%	19.0%	32.9%
Department stores	18.8	29.9	14.9
Discounters, incl. K mart	34.1	39.5	29.5
Specialty stores	17.8	4.2	13.7
Other store types	6.4	7.4	9.0

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Girls' Wear

Distribution of Girls' Coat Purchases by Price Point, 1982
(Percent of Units Purchased)

	Jackets	All Weather Coats		Raincoats
Less than $5.00	3.0%	4.0%	Less than $5.00	37.0%
$5.00 - $9.99	9.3	20.3	$5.00 - $7.99	34.8
$10.00 - $14.99	17.0	20.9	$8.00 - $15.99	17.4
$15.00 - $19.99	17.6	20.3	$16.00 - $23.99	4.4
$20.00 - $29.99	18.1	22.2	$24.00 & over	6.5
$30.00 - $39.99	17.2	8.1		
$40.00 & over	18.5	4.2		

Distribution of Girls' Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Total Slacks	Corduroy Slacks	Non-corduroy Slacks	Denim Jeans	Corduroy Jeans
National chains	25.6%	25.2%	25.9%	22.1%	18.8%
Department stores	18.9	19.2	18.8	17.9	28.7
Discounters, incl. K mart	29.6	26.7	31.4	34.6	23.3
Specialty stores	19.5	21.5	18.3	17.0	23.1
Other store types	6.4	7.4	5.6	8.4	6.1

Distribution of Girls' Bottoms Purchases by Price Point, 1982
(Percent of Units Purchased)

	Total Slacks	Corduroy Slacks	Non-corduroy Slacks	Denim Jeans	Corduroy Jeans
Less than $6.00	30.0%	29.8%	30.0%	19.2%	14.1%
$6.00 - $9.99	35.0	31.2	37.2	34.5	36.9
$10.00 - $13.99	18.1	22.3	15.5	16.9	24.1
$14.00 - $17.99	10.6	9.2	11.4	10.9	13.7
$18.00 & over	6.5	7.4	5.8	18.4	11.2

Distribution of Girls' Suit Purchases by Type of Outlet, 1982
(Percent of Units Purchased)

	Suits	Pantsuits
National chains	14.0%	18.1%
Department stores	36.3	16.9
Discounters, incl. K mart	43.1	40.1
Specialty stores	6.5	16.7
Other outlet types	--	8.2

Source: NPD Special Industry Services, Inc.

CONSUMER BUYING HABITS

Girls' Wear

Distribution of Girls' Suit Purchases by Price Point, 1982
(Percent of Units Purchased)

Suits	Percent
Less than $12.00	10.4%
$12.00 - $13.99	8.2
$14.00 - $15.99	14.1
$16.00 - $19.99	26.2
$20.00 - $29.99	22.7
$30.00 & over	18.4

Pantsuits	Percent
Less than $4.00	15.3%
$4.00 - $7.99	28.5
$8.00 - $11.99	25.5
$12.00 - $15.99	13.5
$16.00 - $19.99	9.7
$20.00 & over	7.5

Source: NPD Special Industry Services, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (June)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (June)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.51

Women's Coats, Suits, Rainwear and Furs

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

WOMEN'S COATS, SUITS & RAINWEAR

Page

MARKET TRENDS.. 1
GENERAL INDUSTRY STATISTICS.. 1
  INDUSTRY CONCENTRATION... 4
  EMPLOYMENT & EARNINGS.. 5
  OPERATING RATIOS... 6
PRODUCTION... 6
SHIPMENTS..10
PRODUCER PRICES..12
FOREIGN TRADE..12
  IMPORTS..12
  EXPORTS..14
THE POTENTIAL MARKET...14
CONSUMER PRICES..17
RETAIL SALES...17
  DRESSY & TAILORED COATS & SUITS......................................17
  CASUAL COATS, JACKETS & RAINWEAR.....................................18
  GENERAL TRENDS...19
  DEPARTMENT STORES..20
  WOMEN'S WEAR STORES..22
RETAIL ADVERTISING...22
CONSUMER BUYING HABITS...23

FURS

MARKET TRENDS..26
GENERAL INDUSTRY STATISTICS..26
SHIPMENTS..29
FOREIGN TRADE..29
RETAIL SALES...30
RETAIL ADVERTISING...33

SCHEDULE OF ADDITIONAL FACT FILES......................................34

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In most instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-459-7

Printed in the United States of America

WOMEN'S COATS, SUITS & RAINWEAR

Market Trends

Activity by retailers at coat and suit markets in Spring 1983 reflected an expectation of an upturn in sales in the Fall season. Wool coats were reported to be exceptionally strong, as well as fur-trimmed items. In the suit market the coat-dress has become a staple. If the pace registered at the markets continues, manufacturers report that sales of coats and suits this year could exceed last year's levels by 20 to 25%.

The use of unusual colors in wool coats and suits, as well as fur trims, new fabrications and fashion features, are expected to excite consumer interest and spark sales. The fact that the coat and suit business is cyclical, and last year was not very strong, is also viewed as a basis for optimism.

Big-name designers have taken an important position in the women's coat and suit market, recognizing the size and growth of the market among young, affluent career women.

On the other hand, a revival of interest in suits, as well as the popularity of jackets, are viewed as channeling open-to-buy into that area at the expense of rainwear. Retailers were reported to be holding back on buying rainwear, and manufacturing activity was down, for the Spring 1983 season, a season which in recent years had been the mainstay as women had adopted raincoats as their spring coat.

In junior wear, miniskirts and divided skirts have caught on and are accounting for an upturn in activity in that area. But the prime apparel customer for most stores is no longer in her teens, but 25 to 44 years of age, interested in quality apparel and investment dressing rather than fads. The coat and suit industry is hard at work to fill these requirements.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The 1981 annual survey of manufactures compiled by the U.S. Census Bureau covers the latest available information on the women's, misses' and juniors' suit and coat industry and on the waterproof outergarments industry at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years, between the complete census of manufactures conducted every five years. It is adjusted for comparability with the most recent census data covering the year 1977.

GENERAL INDUSTRY STATISTICS

Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*)

	1981	1980	1979	1977	% Change 1980/1977	% Change 1981/1977
Number of companies	na	na	na	1,557	--	--
Number of establishments, total**	na	1,360	1,446	1,672	- 18.7%	--
Number with 20 or more employees	na	865	932	1,067	- 18.9	--
Employees, total (thous.)	78.4	78.1	81.3	84.7	- 7.8	- 7.4%
Production workers (thous.)	67.9	67.6	70.9	72.7	- 7.0	- 6.6
Payroll (mil. $)	$ 781.0	$ 730.9	$ 698.4	$ 654.0	+ 11.8	+ 19.4
Value added by manufacture# (mil. $)	2,070.4	1,622.0	1,499.5	1,429.6	+ 13.5	+ 44.8
Value of industry shipments## (mil. $)	3,914.4	3,195.5	3,052.8	2,912.9	+ 9.7	+ 34.4
Capital expenditures, new (mil. $)	23.5	28.9	29.6	22.0	+ 31.4	+ 6.8

(See footnotes following table on the Raincoats & Other Waterproof Outer Garments Industry)

In addition to other noted sources, the Bureau of Industrial Economics, U.S. Department of Commerce, issues an annual Industrial Outlook report which covers industry estimates for major industrial classifications.

According to this source, value of industry shipments in the Suit and Coat Industry was estimated at $3.683 billion in 1982 in current dollars, representing a gain of 3.9% over a 1981 estimated total of $3.543 billion. Adjusting for inflation, in real terms the value of shipments in 1982 fell 7.6% below the 1981 total.

Estimated Value of Industry Shipments
Women's, Misses' & Juniors' Suit & Coat Industry (SIC 2337*)
1981, 1982
(In Billions of Dollars)

Current Dollars		Constant (1972) Dollars		Compound Annual Rate of Growth
1982	1981	1982	1981	1972-82*
$3.683	$3.543	$2.451	$2.654	+ 3.1%

Source: U.S. Bureau of Industry Economics,
1983 U.S. Industry Outlook

Industry data on U.S. rainwear manufacturers are not separately covered in Department of Commerce data but included (with some noted exceptions) in a broad industry classification that covers other types of waterproof apparel, as noted below.

GENERAL INDUSTRY STATISTICS

Raincoats & Other Waterproof Outer Garments (SIC 2385*)

	1981	1980	1979	1977	% Change 1981/1977
Number of companies	na	na	na	155	--
Number of establishments, total**	na	125	134	167	--
Number with 20 or more employees	na	78	85	105	--
Employees, total (thous.)	7.0	11.3	10.7	12.0	- 38.0%
Production workers (thous.)	5.7	9.8	9.0	10.1	- 43.6
Payroll (mil. $)	$ 68.3	$ 102.3	$ 91.0	$ 89.4	- 23.6
Value added by manufacture# (mil. $)	188.1	216.7	198.0	194.4	- 3.2
Value of industry shipments## (mil. $)	377.5	376.5	357.4	348.8	+ 8.2
Capital expenditures, new (mil. $)	4.1	3.6	2.4	5.6	- 26.8

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2337 comprises establishments primarily engaged in manufacturing women's, misses' and juniors' suits, coats, pantsuits and skirts, except fur and leather coats and raincoats. (Apparel made in knitting mills is not included.)

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outergarments made from such materials as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children. It does not include vulcanized rubber garments or rubberized fabric garments produced by fabric manufacturers in the same plant.

**Each business location is counted as a separate establishment. Figures for 1979 and 1980 are from County Business Patterns reports issued by the U.S. Bureau of the Census.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments (as distinct from "product shipments") includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of shipments of specified garments by all producers, including manufacturers classified in other industries (or product shipments) are covered on page 11.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980, 1981

GENERAL INDUSTRY STATISTICS

Industry Concentration

The rainwear industry is very highly concentrated among large companies. Eight companies accounted for over half of industry shipments in 1977, the latest year for which detailed data are available on industry concentration. This compared with a 31% share in 1972.

In the women's coat and suit industry, the 20 largest companies accounted for 31% of industry shipments in 1977 compared with 26% in 1972.

Share of Industry Activity Accounted For By The Largest Companies (Ranked On Value of Shipments), 1977

	Companies	Plants	Value Added By Manufacture	Value of Industry Shipments
Women's Coat & Suit Industry total	100.0%	100.0%	100.0%	100.0%
Share held by --				
4 largest companies	0.3	1.9	12.4	15.2
Next 4 largest	0.3	0.8	4.7	5.1
Next 12 largest	0.8	1.6	10.4	10.4
Next 30 largest	1.9	3.1	12.3	14.3
Remainder	96.7	92.6	60.2	55.0
Rainwear & Waterproof Outergarment Industry				
Share held by --				
4 largest companies	2.5	7.2	42.7	41.0
Next 4 largest	2.5	3.0	9.8	10.7
Next 12 largest	7.6	7.2	16.6	18.5
Next 30 largest	19.1	18.6	18.4	19.7
Remainder	68.3	64.0	12.5	10.1

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Concentration Ratios in Manufacturing (MC77-SR-9).

A later indication of industry concentration is found in the Census Bureau's County Business Patterns reports. Unlike the above information which is based on company data, however, this source reports information in terms of establishments (plants) by number of employees. Only manufacturers with paid employment are included in these figures.

GENERAL INDUSTRY STATISTICS

Industry Concentration

Distribution of the Number of Plants & of Employees By Employment-Size Class, 1979, 1980

	Women's Coat & Suit Industry				Rainwear/Waterproof Outer Garment Ind.			
	Estabs.		Employees		Estabs.		Employees	
	1980	1979	1980	1979	1980	1979	1980	1979
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
No. of employees:								
Under 20	36.4	35.5	6.0	5.9	37.6	36.6	na	na
20 - 49	32.6	32.0	21.0	20.5	21.6	24.6	9.6	12.0
50 - 99	18.2	19.6	25.4	26.4	15.2	17.9	13.8	15.9
100 - 249	10.4	10.0	30.2	28.2	15.2	11.9	27.8	27.3
250 +	2.4	2.9	17.4	19.0	10.4	9.0	na	na

na = not available

Source: U.S. Bureau of the Census,
County Business Patterns, 1979, 1980

Employment & Earnings

Employment in the women's coat, suit and skirt industry in the U.S. in 1982 averaged almost 13% below the 1981 average, and it was almost 20% below average employment in 1977. The number of production workers in the industry has dropped from almost 80,000 in 1966 to less than 46,000 in 1982.

Employment & Earnings in the Women's Coat & Suit Industry, 1977-1982
(Annual Averages)

	1982	1981	1980	1979	1978	1977
Employment, total (thous.)	53.6	61.4	65.6	64.8	64.7	66.8
Production workers (thous.)	45.4	52.4	57.1	55.9	55.5	56.7
Av. weekly earnings	$183.14	$183.82	$170.86	$150.06	$141.12	$132.47
Av. hourly earnings	5.67	5.44	5.04	4.52	4.20	3.99
Av. weekly hours	32.3	33.8	33.9	33.2	33.6	33.2

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Operating Ratios

Selected Operating Ratios in the Women's Coat & Suit Industry
(Median Results By Size of Company Net Worth, 1980)

	Total	Net Worth To $50,000	 $50,000-$2 mil.	 $2 mil. & over
No. of companies covered	232	46	90	96
Current assets to current debt (times)	1.72	1.52	1.91	1.75
Net profits on net sales (%)	2.22	3.21	2.21	2.08
Sales to net worth (times)	8.68	10.58	8.31	7.54
Sales to inventory (times)	7.9	8.5	8.9	7.5

Source: Dun & Bradstreet, Key Business Ratios.

PRODUCTION

Estimates on annual production and shipments are compiled by the U.S. Census Bureau based on a survey of manufacturers, government contractors and jobbers of women's and children's outerwear, except very small firms (generally less than five employees). The estimates include garments which are cut in the U.S. and sent outside of the country to be sewn, then imported into the U.S. under the provisions of item 807.00 of the Tariff Schedule.

The most recent report covers the year 1981. When this study was done approximately 400 establishments were added to the survey which were not covered in previous reports. These newly-added cutters affected comparability with earlier years in varying degrees. They represented from a low of only 3% of total 1981 production of women's rainwear to a high of almost 44% of 1981 cuttings of women's, misses' and juniors' nontailored outerjackets.

Adjusting the data for comparability, following are indicated percentage changes in production of specified items in 1981 compared with 1980:

Estimated Percent Change in Cuttings, 1981/1980

Women's, misses', juniors'	
Suits, except pantsuits	- 21.2%
Pantsuits (including jumpsuits)	- 33.6
Coats, capes, toppers, car coats (except fur and all-leather)	- 16.5
Separate tailored suit type jackets	+ 30.8
Nontailored outerjackets, except ski	- 25.2
Vests, excluding sweater vests	+ 20.4
Raincoats	- 12.8
Skirts	+ 18.5
Pants, except dungarees & jeans	- 7.7

Source: Based on U.S. Bureau of the Census,
Current Industrial Report (MA-23F).

PRODUCTION

The seasonal pattern in cuttings of women's, misses' and juniors' coats of all types and suits showed a concentration of activity for the former in August/September and for the latter, in February/March.

Percent of Reported Cuttings by Months, 1980, 1981

	Coats, Capes, Etc.		Suits, Including Pantsuits	
	1981	1980	1981	1980
Total	100.0%	100.0%	100.0%	100.0%
January	7.5	5.9	8.9	8.4
February	6.7	6.9	9.2	9.7
March	6.7	6.8	9.2	10.4
April	8.6	7.5	8.5	8.6
May	9.9	8.9	8.5	6.6
June	10.5	9.4	9.1	6.9
July	9.3	8.5	8.5	7.3
August	11.0	11.5	8.9	9.3
September	10.2	10.2	8.8	11.2
October	9.6	10.0	7.5	9.2
November	5.7	8.3	6.9	6.6
December	4.3	6.1	6.0	5.8

Source: Based on U.S. Bureau of the Census, Current Industrial Report (MA-23F).

Detailed information reported for 1981 on production by fabric type, and by factory price for coats and suits are covered in the following table. Comparable figures for 1980 are not available.

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel
Total & By Factory Price & Construction/Fabric Type, 1981

	Thous. Units
Women's, misses', juniors' coats, except fur, all-leather & raincoats	14,996
By factory price (per unit):	
Under $16.00	286
$16.00 to $38.99	6,055
$39.00 to $75.99	5,253
$76.00 & over	1,064
Price line, n.s.k.	2,338
By construction:	
Woven fabric	12,298
Knit fabric	485
Construction, n.s.k.	2,213

(continued)

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel
Total & By Factory Price & Construction/Fabric Type, 1981
(continued)

	Thous. Units
Coats (continued)	
By fabric:	
All cotton & chiefly cotton	276
All man-made & chiefly man-made	6,324
All wool & chiefly wool	5,315
All other fabric	55
Fabric, n.s.k.	3,026
Jackets	34,814
Separate tailored suit-type jackets	31,677
By construction:	
Woven fabric	17,651
Knit fabric	9,565
Construction, n.s.k.	4,461
By fabric:	
All cotton & chiefly cotton	2,582
All man-made & chiefly man-made	19,872
All wool & chiefly wool	4,798
All other fabric	213
Fabric, n.s.k.	4,212
Nontailored outerjackets, excluding ski	3,137
By construction:	
Woven fabric	1,102
Knit fabric	2,035
Construction, n.s.k.	
By fabric:	
All cotton & chiefly cotton	na
All man-made & chiefly man-made	1,101
All wool & chiefly wool	425
All other fabric	
Fabric, n.s.k.	1,611
Vests, excluding sweater vests	2,350
By construction:	
Woven fabric	574
Knit fabric	1,527
Construction, n.s.k.	249
By fabric:	
All cotton & chiefly cotton	324
All man-made & chiefly man-made	1,532
All wool & chiefly wool	274
All other fabric	
Fabric, n.s.k.	220

(continued)

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel Total & By Factory Price & Construction, Fabric Type, 1981

(continued)

	Thous. Units
Raincoats	
Plastic (with & without fabric trim)	5,555
Rubberized &/or coated fabric	na
Uncoated fabric:	na
All cotton & chiefly cotton	589
All man-made & chiefly man-made	4,503
All other fabric	203
Construction, n.s.k.	260
Suits	14,234
Pantsuits	6,881
By construction:	
Woven fabric	2,562
Knit fabric	2,692
Construction, n.s.k.	1,627
By fabric:	
All cotton & chiefly cotton	355
All man-made & chiefly man-made	4,412
All wool & chiefly wool	338
All other fabric	
Fabric, n.s.k.	1,776
Suits, except pantsuits	7,353
By factory price (per unit):	
Under $16.00	345
$16.00 to $38.99	4,195
$39.00 & over	2,233
Price line, n.s.k.	580
By construction:	
Woven fabric	2,562
Knit fabric	4,268
Construction, n.s.k.	523
By fabric:	
All cotton & chiefly cotton	384
All man-made & chiefly man-made	5,081
All wool & chiefly wool	1,226
All other fabric	662
Fabric, n.s.k.	
Skirts	97,627
By construction:	
Woven fabric	50,636
Knit fabric	26,377
Construction n.s.k.	20,614

(continued)

PRODUCTION

Production of Women's, Misses' & Juniors' Coats, Suits & Related Apparel Total & By Factory Price & Construction/Fabric Type, 1981 (continued)

	Thous. Units
Skirts (continued)	
By fabric:	
All cotton & chiefly cotton	11,957
All man-made & chiefly man-made	52,460
All wool & chiefly wool	11,792
All other fabric	757
Fabric, n.s.k.	20,661
Slacks, except dungarees & jeans	158,629
By construction:	
Woven fabric	96,237
Knit fabric	42,662
Construction, n.s.k.	19,730
By fabric:	
All cotton & chiefly cotton	22,692
All man-made & chiefly man-made	106,442
All wool & chiefly wool	7,867
All other fabric	2,208
Fabric, n.s.k.	19,420

n.s.k. = not specified by kind.
na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's & Children's Outerwear (MA23F)

SHIPMENTS

The value of primary products shipped by the Coat & Suit Industry--including women's, misses' and juniors' suits, coats, pantsuits and skirts, but not including fur or leather coats, or raincoats--was estimated at $2,806 million in 1982 on a current dollar basis, according to the U.S. Bureau of Industrial Economics. This was almost 8.2% above the Bureau's estimate for 1981. On a constant (1972) dollar basis, however, shipments in 1982 were valued at 3.9% less than in 1981. The compound annual rate of real growth in the period 1972-1982 was reported at + 3.6%.

The annual survey of manufactures, covering a representative sample of manufacturers, indicated that shipments of primary products by the suit and coat industry amounted to $3,513.6 million in 1981.

SHIPMENTS

Value of Shipments of Product Classes, 1977-1980
(In Millions of Dollars)

	1981	1980	1979	1978	1977
Women's, misses', juniors' suits, coats, etc., total	$3,513.6	$2,988.3	$2,752.1	$2,689.6	$2,725.6
Coats, capes	660.0	707.1	737.6	634.7	612.1
Suits	391.7	489.9	517.3	555.9	665.3
Separate skirts, jackets	1,706.9	1,131.4	938.5	847.3	738.3
Contract work on suits, coats, skirts	634.3	596.2	524.0	425.7	423.9
Coats, type not specified	120.7	63.7	34.6	226.1	285.9
Waterproof outer garments (men's, women's, children's)	453.7	447.4	383.6	355.0	338.9

Source: U.S. Bureau of the Census, Annual Survey of Manufactures, Value of Product Shipments.

In addition to the above information on value of shipments, the U.S. Bureau of the Census compiles annual data on shipments based on a survey of manufacturers, contractors and jobbers (excluding very small firms--generally less than five employees). The value of garments cut in the U.S. and sent outside the country to be sewn, then imported under the provisions of item 807.00 of the Tariff Schedule are included in these reports.

Value of Shipments of Specified Products, 1981
(In Millions of Dollars)

Women's, misses', juniors' coats, suits, etc., total	$3,227.7
Coats, except fur, all-leather & rain	649.3
Jackets	
Separate tailored suit-type	795.2
Nontailored outer jackets, excluding ski	70.5
Vests, excluding sweater vests	24.5
Raincoats	207.8
Skirts	1,109.6
Suits	
Pantsuits	102.2
Other suits	268.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Women's and Children's Outerwear (MA-23F)

According to a 1982 Profile of Women's & Misses' Suits and Coats, compiled by the U.S. Bureau of Industrial Economics, the major producing states accounting for the largest percent of industry shipments included the following: New York (35%), California (12%), Massachusetts (11%), New Jersey (9%), Pennsylvania (5%).

PRODUCER PRICES

Producer (Factory) Price Indexes For Specified Types of Women's Wear, 1981, 1982

(1967 = 100)

	Annual Average		% Change
	1982	1981	1982/1981
Women's, misses', juniors'			
Skirts (including uniform)	118.2	113.2	+ 4.4%
Coats (except fur, all-leather & raincoats)	162.8	156.9	+ 3.8
Suits	115.3*	115.3*	--

* Base December 1971 = 100

Source: U.S. Bureau of Labor Statistics.

FOREIGN TRADE

According to preliminary estimates compiled by the U.S. Bureau of Industrial Economics, imports of women's, misses' and juniors' coats and suits amounted to $819.3 million in 1982 compared with total coat and suit exports valued at $37.0 million. The Bureau summarized the overall supply picture as follows in terms of dollar value:

	Mil. $
Value of coat & suit shipments (U.S. producers)	$ 2,806.0
Value of exports of coats & suits	37.0
Value of imports of coats & suits (f.a.s.)	819.3
Exports of a % of shipments	1.3%
Imports as a % of new supply (shipments plus imports)	21.3%
Imports as a % of apparent consumption (product shipments plus imports less exports)	22.8%

f.a.s. - free alongside ship at foreign port of exportation.

Imports

Apparel imports in general reached a new high in 1982 despite the recession in the U.S. and curtailed buying on the part of retailers and consumers. In the first 10 months of the year unit imports of women's and children's coats and jackets for consumption in the U.S. gained 12% compared with the same 1981 period. Imports of suits in the same period rose 53% while skirt imports went up over 8%. Raincoat imports, however, showed a leveling off.

Data compiled by the Research Department, International Ladies' Garment Workers Union based on U.S. Bureau of the Census reports show the growth in imports for consumption in the U.S.

FOREIGN TRADE

Imports

Imports of Coats & Suits For Consumption in the U.S.
(Thousands of Units)

	Jan.-Oct.						
	1982	1981	1981	1980	1979	1978	1977
Women's, misses', children's Coats & jackets	50,816	45,277	52,077	42,857	32,602	36,696	32,681
Suits	3,241	2,117	2,766	1,715	2,169	3,499	3,373
Raincoats, total	5,707	5,712	6,759	6,696	9,572	9,918	7,229
Cotton*	1,735	1,675	1,995	2,331	4,029	3,888	2,465
Man-made fibers	3,971	4,037	4,764	4,365	5,542	6,030	4,764

*Includes men's as well as women's and children's cotton raincoats.

Source: ILGWU, Conditions in the Women's Garment Industry (January 5, 1983).

The value of U.S. manufacturers' shipments of women's, misses' and juniors' coats and suits in 1982 were up 168% compared with 1977; however, imports in this period rose 208%, according to the U.S. Bureau of Industrial Economics. Imports, according to this source, represented about 10% of new supply (in terms of value) in 1977, 19.3% in 1981 and 21.3% in 1982. (1983 U.S. Industrial Outlook).

Imports of specified types of coats into the U.S. in 1982 compared with 1981 are reported as follows:

Quantity & Value of General Imports of Coats & Raincoats, 1981, 1982 By Leading Country of Origin
(Women's, Misses' & Children's)

	Thousand Dozens		Value (CIF)* (thous. dollars)	
	1982	1981	1982	1981
Total, reported types	4,828.6	4,229.6	$657,124	$570,050
Coats -- not knit				
Wool	163.8	167.6	44,978	43,570
Japan	30.6	20.1	6,614	4,242
Hong Kong	28.2	25.1	7,559	6,402
Uruguay	27.2	32.7	6,308	8,133
Cotton, 3/4 length or longer	250.5	197.5	55,143	43,355
Hong Kong	51.8	56.3	12,393	13,073
Poland	24.3	19.8	5,603	4,495
Taiwan	23.3	20.8	6,609	5,368
Other cotton coats	1,454.9	1,539.1	211,021	216,947
China	306.5	369.2	43,143	45,170
Hong Kong	223.0	240.9	36,940	39,452
Japan	221.8	231.9	40,042	44,988

(continued)

FOREIGN TRADE

Imports

Quantity & Value of General Imports of Coats & Raincoats, 1981, 1982
By Leading Country of Origin
(Women's, Misses' & Children's)
(continued)

	Thousand Dozens		Value (CIF)* (thous. dollars)	
	1982	1981	1982	1981
Man-made fiber coats	2,797.9	2,161.5	312,622	230,879
Taiwan	562.3	571.3	70,942	66,962
Korea Republic	526.3	592.1	80,651	74,725
Hong Kong	470.3	340.7	51,085	37,602
Wool knit coats	21.1	23.0	7,660	9,397
Hong Kong	12.0	10.6	2,742	2,507
Iceland	3.1	3.7	1,885	2,395
Taiwan	1.4	0.9	320	257
Raincoats, 3/4 length or longer: man-made fiber	140.4	140.9	25,700	25,302
Hong Kong	42.4	38.4	9,248	9,447
Korea Republic	31.1	53.6	6,118	9,429
Taiwan	23.1	17.7	4,093	2,673

*CIF value includes freight, insurance, etc. (but not duties) at the first port of arrival in the U.S.

Source: U.S. Bureau of the Census, FT 135.

Exports

Exports represent a very small part of the shipments of the U.S. coat and suit industry, but have increased in value from $13.8 million in 1977 to about $37 million in 1982, according to the U.S. Bureau of Industrial Economics. Exports' share of total shipments of women's coats and suits have increased from 0.6% in 1970 to 1.3% in 1982. The total value of exports of fur garments and pelts was $350.1 million in 1982.

THE POTENTIAL MARKET

Two demographic trends offer encouragement to marketers of apparel--the growth in the young adult population (the baby-boomers born from 1945 to 1954) and the rapid increase in the size of the female labor force. These are positive factors helping to stimulate consumer demand as economic conditions improve. Young adults are above average in their interest in buying apparel and working women require a larger wardrobe than most non-working women.

In October 1982 the Census Bureau issued an advance version of its first population projections since 1977. These new projections are by age, race and sex for the United States from 1982 to 2050. A more detailed, final report is scheduled for release in July 1983. The advance report included three different series of population projections derived from alternative assumptions on fertility, mortality and net immigration levels. Projections for the total population for the year 1985, for example, range from a low of 237,366,000 for the total population to a high of 240,364,000.

THE POTENTIAL MARKET

The following figures are from the "middle" series, reflecting the middle assumptions on future developments in the three components, and looking to a population totaling 238,648,000 by 1985.

Projections of the U.S. Female Population, 1983-2000 (Middle Series) By Age Groups

	Number (thousands)			% Change		% of Total Female Population		
	1983	1990	2000	1990/83	2000/1990	1983	1990	2000
Total, all ages	120,216	128,234	137,611	+ 6.7%	+ 7.3%	100.0%	100.0%	100.0%
Under 16 years	26,924	28,240	29,175	+ 4.9	+ 3.3	22.4	22.0	21.2
16 years & over	93,293	99,994	108,436	+ 7.2	+ 8.4	77.6	78.0	78.8
16 - 19	7,654	6,704	7,373	-12.4	+10.0	6.4	5.2	5.4
20 - 34	30,925	30,774	26,442	- 0.5	-14.1	25.7	24.0	19.2
35 - 54	26,458	32,170	40,810	+21.6	+26.9	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 7.4	+11.4	23.5	23.7	24.6
Median age (yrs.)	32.2	34.3	37.7					

Sub-Totals, Ages 25 - 44--1983, 1990, 2000

	Number (thousands)			% Change		% of Total Female Population		
	1983	1990	2000	1990/83	2000/1990	1983	1990	2000
Females 25-44 years, total	35,095	40,758	39,912	+16.1%	- 2.1%	29.2	31.8	29.0
25 - 29 years	10,571	10,647	8,589	+ 0.7	- 19.3	8.8	8.3	6.2
30 - 34 years	9,584	10,992	9,438	+14.7	- 14.1	8.0	8.6	6.9
35 - 39 years	8,234	10,071	10,834	+22.3	+ 7.6	6.8	7.8	7.9
40 - 44 years	6,706	9,048	11,051	+34.9	+ 22.1	5.6	7.1	8.0

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 922 (Issued October 1982)

Working Women

Even with the continuing economic slowdown, the number of women in the labor force increased by 1.1 million between the fourth quarters of 1981 and 1982. By the end of 1982, 48.3 million women--53 percent of all the women in the population 16 years old and over--were looking for work or were working.

Labor force participation rates are highest among younger women, those most interested in buying apparel and the group that is also the largest segment of the population at the present time. Among women age 20 to 24 years, almost 70% were in the labor force in 1982; among those 25 to 54, 66.3%. Comparable percentages in 1970 were 57.7% and 50.1%, respectively.

Nearly half a million more women were employed in professional-technical and service jobs in 1982 than in the previous year. The fastest growth (representing 60% of women's employment gains in the professional-technical category) occurred in male-dominated occupations such as computer specialists, engineering and law--fields where women tend to favor the wearing of suits and skirts.

THE POTENTIAL MARKET

Working Women

Employed women age 20 to 24 years averaged close to 6.5 million in 1982, up 44.4% over the 1970 total of about 4.5 million. Employed women age 25 to 54 increased in this same period from 17.4 million to 27.8 million, a gain of almost 60%.

Summary Indicators On Working Women, 1970, 1981, 1982
(Annual Averages)

	1982	1981	1970
Women 16 years & over (thous.)			
Civilian noninstitutional population	90,748	89,618	72,782
Civilian labor force	47,755	46,696	31,543
Labor force participation rates (labor force as percent of population)			
Women 16 years & over	52.6%	52.1%	43.3%
16 to 19 years	51.4	51.8	44.0
20 to 24 years	69.8	69.6	57.7
25 to 54 years	66.3	65.3	50.1
55 years & over	22.7	22.7	25.3
Employment status (thous.)			
Women 16 years & over			
Employed	43,256	43,000	29,688
Unemployed	4,499	3,696	1,855
16 to 19 years			
Employed	3,170	3,411	2,735
Unemployed	886	800	506
20 to 24 years			
Employed	6,492	6,618	4,494
Unemployed	985	833	760
25 to 54			
Employed	27,813	27,223	17,390
Unemployed	2,336	1,836	818
55 years & over			
Employed	5,781	5,749	5,069
Unemployed	292	227	144

Source: U.S. Bureau of Labor Statistics

Trade sources estimate that women 25-to-44 years of age, who represent 29% of the female population of the U.S. and who have a labor force participation rate of over 66%, account for 37% of apparel purchases in the U.S. To an increasing extent, this group is encompassing career women--women in management positions who have specific apparel requirements which impact on the coat, suit and skirt market.

A study by Associated Merchandising Corp., a buying office for large store groups, indicated that career women earning over $15,000 accounted for an estimated $128 billion in earnings income in 1981. Their discretionary income was $25.6 billion and, of that amount, $12 billion was set aside for clothes to be worn primarily on the job.

THE POTENTIAL MARKET

Working Women

According to a survey by Celanese Marketing Co., professional women, such as attorneys and corporate executive types, spend over $5 billion on apparel, an amount expected to grow 8 to 10% annually through 1985. Informal professional women, such as social workers or teachers, spend $3.6 billion on apparel, and this is expected to grow 5 to 7% a year.

CONSUMER PRICES

Consumer Price Indexes for Specified Women's Apparel Categories, 1979, 1980
(All Urban Consumers)

	Annual Averages			% Change
	1982(p)	1981	1980	1982/1981
Women's & girls' apparel (1967 = 100)	159.1	157.5	155.1	+ 1.0%
Women's coats & jackets (1967 = 100)	162.4	159.1	164.2	+ 2.1
Women's suits (Dec. 1977 = 100)	85.8	89.2	90.9	- 3.8

(p) preliminary

Source: U.S. Bureau of Labor Statistics

RETAIL SALES

The only official information available on sales of women's coats and suits in specified types of retail outlets is contained in the 1977 Census of Retail Trade, U.S. Bureau of the Census. Only stores with payrolls are included in the merchandise line reports and not all store types were required to break down their sales by merchandise category. Due to a change in the classification system, comparative figures for earlier census years are not available.

Dressy & Tailored Coats & Suits

Women's ready-to-wear stores accounted for almost half of reported sales of women's dressy and tailored coats and suits in 1977. Department store sales of $550.2 million represented 34.1% of the total which, as defined by the Census Bureau, excludes pantsuits and rainwear.

RETAIL SALES

Dressy & Tailored Coats & Suits

Reported Sales of Coats & Suits By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's, misses' & juniors' coats & suits	33,099	100.0%	$1,615.7	100.0%
Department stores**	5,787	17.5	550.2	34.1
Women's ready-to-wear stores	17,334	52.4	800.1	49.5
Family clothing stores	5,702	17.2	156.2	9.7
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,276	12.9	265.4	16.4

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores and department stores operated by mail order chains. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Source: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Casual Coats, Jackets & Rainwear

In 1977, sales of casual coats, jackets and rainwear were reported at $1.56 billion in the leading store types. Women's ready-to-wear stores reported sales of $681.1 million, 43.5% of the total.

Reported Sales of Casual Coats, Jackets & Rainwear By Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's, misses', juniors' casual coats, jackets & rainwear	39,449	100.0%	$1,565.9	100.0%
Department stores**	6,940	17.6	608.8	38.9
Women's ready-to-wear stores	18,640	47.2	681.1	43.5
Family clothing stores	9,256	23.5	201.9	12.9
All other outlets (men's wear stores, children's wear stores & mail order houses)	4,613	11.7	74.1	4.7

(See footnotes on previous table)

Source: U.S. Bureau of the Census
Census of Retail Trade, 1977
Merchandise Line Sales RC 77-L.

RETAIL SALES

Casual Coats, Jackets & Rainwear

Percent of Total Women's & Children's Wear Sales Accounted For By Coats & Suits in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% of Sales Accounted For By: Dressy & Tailored Coats & Suits	Casual Coats, Jackets & Rainwear
Department stores	$16,250.7	3.4%	3.7%
Women's ready-to-wear stores	11,066.5	7.2	6.1
Family clothing stores	3,471.6	4.5	5.8

*Excludes footwear sales.

Source: U.S. Bureau of the Census
Census of Retail Trade, 1977
Merchandise Line Sales RC 77-L

General Trends

Sales Trends Among Key Coat & Suit Retail Outlet Types Total Store Sales, 1977-1982 (Millions of Dollars)

	1982	1981	1980	1977
Department stores	$107,030	$103,609	$94,705	$76,469
Women's ready-to-wear stores	17,169	16,352	15,074	12,444
Family clothing stores	10,830	10,441	9,604	8,055

Source: U.S. Bureau of the Census,
Monthly Retail Trade

A record of household purchases in terms of units is maintained in diaries by a nationwide panel of consumers reporting to Market Research Corporation of America. According to this source, out of a total of $35.2 billion in reported purchases of women's wear in the 12 months ending October 1980, outerwear (outer jackets, coats) accounted for 7.7% ($2.7 billion); skirts, jackets, suits, 13.8% ($4.8 billion). Distribution of purchases of outerwear and skirts, etc., was reported by this source as follows:

RETAIL SALES

General Trends

Share of Total Unit Purchases & Average Price Paid
(12 months ended October 1980)

	% of Unit Purchases		Average Price Paid	
	Women's Outerwear*	Women's Skirts, Jackets, Suits	Women's Outerwear*	Women's Skirts, Jackets, Suits
Total purchases	100.0%	100.0%	$49.76	$20.12
Sears, Penney, Ward	14.3	5.8	40.08	13.99
Upscale discounters	2.6	2.2	23.34	13.22
Other discounters	14.2	14.6	33.93	14.04
Department stores	26.3	32.9	61.95	22.13
Specialty stores	27.4	33.2	60.34	23.61
Mail order catalog	7.1	4.8	37.55	14.60
Variety stores	1.1	1.0	19.84	8.68
All other	6.8	5.6	41.39	19.24

*Coats, raincoats, outerjackets.

Source: Market Research Corporation of America
(Chain Store Age, General Merchandise Edition, March 1981)

Misses' sizes account for the great bulk of skirt, jacket and suit sales, according to Chain Store Age. However, their data which is based on purchase diary information compiled by Market Research Corporation of America, shows that gains have been made in junior sizes since 1976.

Percent of Skirt, Jacket & Suit Sales By Size Classification, 1976, 1980

	Units		Dollars	
	1980	1976	1980	1976
Skirts, jackets & suit sales, total (thousands)	198,117	94,371	$1,291.7	$3,918.5
	100.0%	100.0%	100.0%	100.0%
Juniors'	18.2	17.6	16.2	14.6
Misses'	66.7	72.6	71.6	75.5
Women's	4.6	4.1	4.2	4.5
Not reported	10.5	5.7	8.0	5.4

Source: Chain Store Age (General Merchandise Edition), (February 1981)

Department Stores

Within department stores, as well as the larger women's specialty stores, the trend in recent years has been to make special efforts to attract career women, opening special shops, putting personal shoppers on the floor, adjusting store hours. Blazers, jackets, suits, and skirts make up an important part of these special efforts.

RETAIL SALES

Department Stores

Nevertheless, the typical department store registered a 2.7% drop in suit sales for women, misses and juniors, but coat business--particularly all-weather coats and jackets--registered a typical gain of 3.7% in 1981 over 1980. Other typical operating ratios for department stores throughout the country are noted below. Figures for 1982 are not yet available, but may reflect the general downturn in the economy.

Merchandising & Operating Results in Coat & Suit Departments, 1981
(Median Results for Department Stores With Sales Over $1 Million)

			Women's, Misses' & Juniors'		
	Adult Female Apparel Total	Coat & Suit Depts.*	Dressy & Tailored Coats	Jackets, Casual & All-Weather Coats	Suits
(No. reporting companies)	113	85	86	62	39
Net sales, % chg. over last year	+ 8.8%	- 0.9%	+ 1.0%	+ 3.7%	- 2.7%
Net sales, % of adult female app.	100.0	0.4	2.4	1.4	1.4
Net sales, % of total store sales	24.5	2.0	1.0	0.6	0.1
$ sales per sq. ft. of selling space (main or largest unit)	$129.2	$118.5	$129.0	$163.0	$67.6
Cumulative markon, %	50.8%	50.3%	50.0%	50.0%	50.7%
Gross margin, % of net sales (incl. cash discounts)	43.0	41.7	41.4	43.3	37.2
Markdowns, retail, % of net sales	20.9	21.9	24.0	18.4	28.7
Number of stock turns (times)	3.8	3.4	3.2	3.6	3.4
Selling salaries, % of sales (main or largest unit)	6.8	7.0	6.5	6.5	7.9
Sales promotion, % of net sales	2.9	4.2	3.9	4.0	3.0

* Women's & misses', not including juniors'

Source: National Retail Merchants Association
Merchandising & Operating Results of 1981 (1982 Edition)

Women's specialty store's coat and suit departments generally showed better sales results than noted in department stores in 1981. This was particularly apparent in suit business. Sales of women's, misses' and juniors' suits in the typical specialty store registered a gain of almost 16% in 1981 over 1980. Jackets, casual and all-weather coats, on the other hand, did better in department stores.

RETAIL SALES

Women's Wear Stores

Merchandising & Operating Results in Coat & Suit Departments, 1981
(Median Results For Specialty Stores With Sales Over $1 Million)

	Adult Female Apparel Total	Coat & Suit Depts.*	Women's, Misses' & Juniors' Dressy & Tailored Coats	Women's, Misses' & Juniors' Jackets, Casual & All-Weather Coats	Women's, Misses' & Juniors' Suits
(No. of reporting companies)	47	33	26	14	16
Net sales, % chg. over last year	+ 6.7%	+ 1.1%	+ 3.8%	- 8.0%	+ 15.9%
Net sales, % of adult female app.	100.0	14.3	7.1	4.7	3.3
Net sales, % of total store sales	50.7	7.0	2.8	1.7	1.1
$ sales per sq. ft. of selling space (main or largest unit)	$147.1	$157.0	$156.8	$125.3	$238.8
Cumulative markon, %	51.8	50.7	50.3	51.6	51.0
Gross margin, % of net sales (including cash discounts)	43.0	42.4	40.6	43.4	43.3
Markdowns, retail, % of net sales	20.9	21.0	21.3	21.6	17.8
Number of stock turns (times)	3.5	3.3	3.4	2.7	4.1
Selling salaries, % of sales (main or largest selling unit)	7.7	7.4	7.3	nr	nr
Sales promotion, % of net sales	2.4	2.5	2.1	nr	nr

* Women's & misses', not including juniors'

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981 (1982 Edition).

Another trend in recent years has been for men's wear manufacturers and men's wear specialty stores to get into the women's tailored career apparel business, including suits, blazers, jackets and skirts. This was done to counteract soft sales in men's tailored clothing, as well as to take advantage of the fast growth in the number of career women and the popularity of the preppie look. This look has been on the wane and it remains to be seen if men's wear stores will be able to maintain growth in the women's apparel area.

RETAIL ADVERTISING

Seasonality in Retailers' Newspapers Advertising Linage On Women's & Misses' Coats & Jackets, 1980, 1981

Percent of Years' Total Linage By Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
1981	7.2	7.0	7.2	5.9	2.9	2.6	3.8	9.1	12.8	15.4	14.9	11.2	100.0%
1980	8.1	7.8	7.8	4.8	2.7	3.6	4.3	9.9	11.3	15.1	13.8	10.8	100.0

Source: Advertising Checking Bureau, Neustadt Reports Div., covering retail newspaper linage in seven cities.

CONSUMER BUYING HABITS

A study on purchase patterns for blazers, which make up an important part of the career woman's wardrobe, was conducted in a nationwide Gallup Poll for Chain Store Age. Some findings: most women own more than one blazer; 50% of the women in the U.S. had bought or planned to buy a blazer in the survey year (1982); most (55%) will not pay more than $50, 30% anticipate spending more than $50, the rest were unsure.

Department stores are preferred stores to shop for blazers, according to the Gallup Poll, particularly for women 25 to 44 years of age. Overall these stores accounted for 36.8% of women reporting on their preferred place of purchase; specialty stores, 20.3%; Penney, Sears and Ward, a little over 15%. (Chain Store Age, General Merchandise Edition, August 1982). Nearly 60% of the women who had bought blazers in 1981 had purchased them at sale price.

The following information on purchases of coats, suits, rainwear and furs for women 14 years of age and older for the years 1982 and 1981 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on findings from an ongoing monthly panel diary tracking the purchases of 6,500 nationally representative families.

The seasonal pattern in purchases of women's coats, raincoats and outer jackets is indicated in reported household purchases compiled by NPD (National Panel Diary).

Women's Percent of Households Buying Women's Coats, Raincoats & Outerjackets Each Month, 1981

Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
4.1%	2.7	2.2	1.7	1.7	0.9	1.1	2.2	1.8	3.5	3.6	2.4	100.0%

Source: National Panel Diary, 1981 (1983 Newspaper Advertising PlanBook, Newspaper Advertising Bureau).

Patterns in Purchases of Coats, Furs & Raincoats, 1981, 1982
(Percent of Dollars Spent for Women 14 Years & Older)

	Raincoats		All-Weather Coats		Fur/Fur-Like/ Pile Coats	
	1982	1981	1982	1981	1982	1981
Year, total*	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Distribution by months						
January	4.2	6.6	7.9	10.3	17.0	26.9
February	5.1	4.7	11.4	10.2	11.2	22.3
March	13.0	19.6	9.7	8.1	10.8	1.8
April	24.3	10.6	4.8	9.1	--	5.4
May	4.8	10.4	2.0	5.6	11.4	--

(continued)

Patterns in Purchases of Coats, Furs & Raincoats, 1981, 1982
(Percent of Dollars Spent for Women 14 Years & Older)
(continued)

	Raincoats		All-Weather Coats		Fur/Fur-Like/ Pile Coats	
	1982	1981	1982	1981	1982	1981
June	6.5%	5.6%	3.4%	1.9%	--	--
July	4.0	6.6	1.1	2.1	2.6%	1.3%
August	12.5	11.1	4.6	5.0	12.9	2.3
September	5.9	3.7	6.7	8.7	2.6	8.3
October	3.5	9.1	9.0	12.7	5.5	7.2
November	10.6	4.8	17.2	10.2	12.2	6.7
December	5.5	7.1	22.0	16.1	13.7	17.8
By store type						
Department stores						
Major	29.6	22.2	18.9	18.6	11.8	10.9
Minor	17.9	25.4	16.1	21.0	17.7	28.0
National chains (Sears, Penney, Ward)	15.6	13.5	15.3	19.0	11.6	11.4
Specialty stores	23.8	20.7	31.3	21.7	35.0	38.2
Discount stores	5.1	5.9	8.9	8.2	3.7	9.1
Other & no answer	8.0	12.3	9.5	11.5	49.7	41.3
Price paid						
Less than $20	14.0	12.4	2.1	3.7	1.3	0.5
$20 - $39.99	26.7	33.4	13.6	19.0	4.5	3.5
$40 - $69.99	23.8	27.9	35.3	37.0	9.0	7.0
$70 - $99.99	21.8	11.7	21.2	26.5	9.8	12.6
$100 & over	13.7	14.6	27.8	13.8	35.1	40.7
No answer	--	--	--	--	40.3	35.7
By major fiber content						
100% polyester	11.7	22.7	19.1	30.1	2.2	1.3
Polyester blends	53.1	54.6	51.3	43.7	4.0	1.7
Cotton, cotton blends	3.4	--	2.3	0.5	0.1	--
Wool, wool blends	--	--	10.3	5.6	9.9	2.0
Other & no answer	31.8	22.7	17.0	20.1	83.8**	95.0**

* Columns may not add exactly to 100% due to rounding.
**Acrylic and acrylic blends: 1982, 18.5%; 1981, 14%.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Patterns in Purchases of Suits & Skirts, 1981, 1982
(Percent of Dollars Spent for Women 14 Years & Older)

	Suits, Blazers		Skirts, Pants Skirts	
	1982	1981	1982	1981
Year, total*	100.0%	100.0%	100.0%	100.0%
Distribution by months				
January	7.0	8.3	6.7	6.2
February	7.4	5.1	4.7	4.7
March	8.5	11.5	8.6	6.3
April	10.5	11.7	10.4	9.2
May	7.6	8.4	8.2	7.8
June	4.2	4.1	6.2	7.1
July	4.5	2.5	8.0	8.5
August	5.9	6.3	7.4	8.3
September	8.4	8.9	9.8	11.2
October	14.1	11.3	10.2	10.2
November	10.7	7.4	9.6	9.4
December	11.2	14.5	10.1	11.0
By store type				
Department stores				
Major	14.7	20.3	16.9	21.0
Minor	12.8	17.6	17.5	15.6
National chains (Sears, Penney, Ward)	5.6	6.2	9.2	7.1
Specialty stores	44.0	41.4	36.5	36.5
Discount stores	13.3	7.9	9.4	10.5
Other & no answer	9.6	6.6	10.5	9.3
Price paid				
Less than $20	4.8	5.5	52.9	53.4
$20 & over	95.2	94.5	47.1	46.6
$20 - $39.99	13.2	14.6		
$40 - $69.99	28.4	25.8		
$70 - $99.99	19.6	17.7		
$100 & over	33.9	36.4		
By major fiber content				
100% polyester	17.4	23.0	21.9	20.0
Polyester blends	28.6	31.9	39.2	40.2
Cotton, cotton blends	3.5	4.0	13.4	10.4
Wool, wool blends	32.4	27.1	12.7	14.5
Other	12.3	8.1	7.0	9.2
No answer	5.8	5.9	5.8	5.7

* Columns may not add exactly to 100% due to rounding.

Source: NPD Special Industry Services.

FUR APPAREL

Market Trends

The U.S. fur apparel industry fared better than might be expected in 1982 in view of the poor economic conditions prevailing during the year, the high interest charges and a strong dollar which held down exports while imports climbed. The strong position the fur industry has taken in recent years in the fashion scene, the continued demand for luxury furs, and the popularity of furs among the affluent and young career women were major factors in a sales increase estimated at 5% over the 1981 total.

Major changes are taking place in the domestic industry, however. The high cost of doing business and the scarcity of skilled labor are causing many small fur manufacturing establishments to go out of business. The industry is becoming increasingly concentrated among a few large firms.

Manufacturers are competing with retailers for the consumer dollar, particularly in Manhattan, holding special weekend promotions in hotels, opening free standing stores and operating fur departments in discount outlets.

Furs for men have become much more important in recent years, and are expected to increase in 1983. In general, however, it is reported that as retailers entered 1983, inventories of fur apparel were leaner than they had been in many years, and the new season was being approached with caution in buying.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The latest detailed information on the fur industry is covered in the 1980 annual survey of manufacturers covering a representative sample nationwide, conducted by the U.S. Bureau of the Census. Findings have been adjusted for comparability with the complete census of manufactures, last conducted for the year 1977.

GENERAL INDUSTRY STATISTICS

Fur Goods (SIC 2371*)

	1980	1979	1977	% Change 1980/1977
Number of companies	na	na	620	--
Number of establishments, total**	505	526	620	- 18.5%
Number with 20 or more employees	43	55	48	- 10.4
Employees, total (thous.)	4.4	4.8	4.0	+ 10.0
Production workers (thous.)	3.4	3.8	3.2	+ 6.2
Payroll (mil. $)	$ 68.2	$ 62.9	$ 51.5	+ 32.4
Value added by manufacture# (mil. $)	156.1	147.1	112.8	+ 38.4
Value of industry shipments## (mil. $)	541.8	488.5	383.4	+ 41.3
Capital expenditures, new (mil. $)	1.0	4.1	0.5	+100.0

na = not available

*SIC 2371 includes establishments primarily engaged in manufacturing fur coats and other garments, accessories, and trimmings made of fur. The industry includes producers of fur caps, coat linings, glove linings and other fur apparel, such as capes, coats, hats, jackets and neckpieces. Establishments primarily engaged in manufacturing sheep-lined clothing are classified in Industry 2386, and those engaged in dyeing and dressing of furs in Industry 3999.

**Each business location is counted as a separate establishment. Data for 1979 and 1980 are from County Business Patterns, an annual report issued by the Census Bureau which covers establishments with paid employment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished goods inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in the industries. The value of shipments of fur goods only, by all producers, (product shipments) including manufacturers making them as secondary products, is covered on page 29.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1979, 1980.

There are undoubtedly many one-man operations making specialized types of fur goods in the U.S. and government figures do not include these. Of the manufacturers with paid employees, most plants had from one to four (62% in 1980). The 3.5% of the plants with 20 or more employees, however, accounted for 42.4% of the industry paid employment.

GENERAL INDUSTRY STATISTICS

The Census Bureau reported that in 1977 the four largest companies in the Fur Goods Industry accounted for about 11% of total industry shipments; the 50 largest accounted for 51% of the total.

Fur Goods Manufacturers
Distribution of the Number of Plants & of Employees
By Employment-Size Class, 1979, 1980

	Plants		Employees	
	1980	1979	1980	1979
Total	100.0%	100.0%	100.0%	100.0%
Number of employees*				
1 to 4	62.0	57.2	16.8	16.2
5 to 9	17.4	17.5	16.7	15.6
10 to 19	12.1	14.8	24.1	24.8
20 or more	8.5	10.5	42.4	43.4

* Only manufacturing operations with one or more paid employees are included in this table.

Source: U.S. Bureau of the Census, *County Business Patterns*.

The industry expects the Eighties to mark a period of consolidation within the U.S. fur manufacturing industry, with the larger firms gaining more business and smaller companies either being absorbed by the bigger ones or disappearing.

The fur industry is a cash-intensive industry, and has been hurt by the high interest rates prevailing in 1981-1982 and by rising labor costs. The result has been that large firms are getting larger, smaller firms are being forced out of business. A recent trend, expected to continue this year, is toward a reduction in the size of the average manufacturers' factory, and an increase in the use of outside contractors.

The U.S. fur industry is heavily concentrated in New York--particularly in Manhattan. According to the 1977 Census of Manufactures, about 86% of all fur manufacturing establishments in the U.S. were in New York and this market accounted for over 90% of total value of shipments.

According to the American Fur Industry (AFI), the promotional arm of domestic fur manufacturers, the industry currently consists of about 600 manufacturers, most of which are in the New York City area.

Manhattan's fur industry is shrinking, however. The Furriers Joint Council of New York, which represents workers in fur manufacturing, reports that it now has 2,500 members. In addition there are an estimated 3,500 non-unionized workers, making a total of 6,000--down from 12,000 in the 1960's. Modernized technology and increased productivity are said to account for some of the decline, in addition to the industry problems previously noted.

SHIPMENTS

According to preliminary figures for the year 1980 compiled in the latest available annual survey of manufactures by the U.S. Census Bureau, shipments of all types of fur goods by U.S. manufacturers were valued at close to $540 million. This represented a gain of almost 16% compared with the previous year and was 51% above the 1977 figure based on a complete census of U.S. manufacturers.

Value of Shipments of Fur Goods By All U.S. Producers, 1977
(Millions of Dollars)

	Value of Shipments					
	1980*	1979	1978	1977	% Change 1980/1979	% Change 1980/1977
Fur goods, total	$539.8	$466.8	$384.9	$358.5	+ 15.6%	+ 50.6%

* Defined as of "limited reliability."

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Surveys of Manufactures, 1978-1980.

Of the total value of shipments of fur goods in 1977, reported at $358.5 million, the 50 largest companies in the U.S. accounted for over half (52%), the 20 largest companies held a 33% share; the four largest, 12%. Comparable figures in the previous census covering the year 1972 were 39%, 23% and 7%, respectively. Concentration of sales among fewer large companies has continued since 1977.

U.S. manufacturers' shipments in 1982 hit an estimated total of over $600 million, according to available information. Gains were held down by the recession, which affected lower- and middle-priced furs more than the higher-priced apparel, as well as by a decline in the export market.

FOREIGN TRADE

According to the American Fur Industry (AFI), imports of fur apparel into the U.S. rose about 25% in 1982 while exports slid at about the same rate. It was reported to be the second year in a row, after more than a decade of increases, that exports declined. Based on information supplied by the U.S. Bureau of the Census, U.S. exports of fur wearing apparel in 1982 were valued at $47.7 billion. Mink accounted for $20.3 billion, or 42.7% of the 1982 total.

West Germany, which was the second most important market for U.S. furs up to 1981, again lost ground. Exports to West Germany slid 38% in 1982. This decline, coupled with a drop of 52.4% the previous year, brought West Germany's share of the U.S. fur apparel export market to 16.3%, behind Japan's 31.9% and Switzerland's 19.2%. Switzerland, it should be noted, is a major wholesaling center for furs.

The decline in exports was attributable to the strong U.S. dollar prevailing in 1982, weak economies in traditional U.S. export markets, and the continued emergence of the Far East as a production center. The bulk of fur garments imported by other countries, however, is reported to be of low quality and price--not generally competitive with U.S.-made fur apparel. However, U.S. exports of mink garments dropped 29.8% in 1982, while other fur apparel exports dropped 21.1% compared with 1981.

FOREIGN TRADE

Total fur garment imports into the U.S. in 1982 were valued at $137.1 million in contrast with exports of $47.7 million. Leading markets for U.S. fur apparel in rank order were as follows in 1982: Japan, Switzerland, West Germany, Canada, Great Britain, Italy, Venezuela, Mexico, France and Sweden. Last year saw Canada move from seventh place as a market for U.S. apparel to fourth, while Hong Kong and Iceland dropped out of the top 10 and Mexico and Sweden made the list.

The Korean Republic has held the position of top supplier of imported fur apparel for the past two years, replacing Hong Kong. In spite of the fact that Hong Kong furs are duty-free to the U.S., and there are no quota restrictions, Hong Kong has dropped from its position as the top foreign source to third position. This is attributed to a shift in emphasis in Hong Kong to higher quality fur apparel for which Japan offers them a bigger market.

Canada has grown rapidly as a source of U.S. imports of fur apparel, accounting for 21.4% of the total value of U.S. imports in 1982, up from 17.6% share in 1981, about 13% in 1980. In all, fur imports from the Far East and Canada account for about 15% of the dollar volume of furs sold in the U.S., according to trade sources.

The Value of Imports of Fur Clothing & Articles
By Leading Country of Origin, 1980-1982
(CIF Value in Thousands of Dollars)

	1982	1981	1980	% Change 1982/1981
Total value	$137,106	$110,759	$88,839	+ 23.8%
Korean Republic	51,138	35,856	26,603	+ 42.6
Canada	29,386	19,479	11,456	+ 50.9
Hong Kong	19,491	21,191	29,263	- 8.0

The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135.

RETAIL SALES

Retail sales of furs in the U.S. in 1982 topped the $1 billion mark for the second year in a row and were up an estimated 5% over the 1981 record level, according to the AFI. Not all segments of the industry enjoyed gains, however. Customers for lower- and middle-priced furs were most affected by the downturn in the economy, but affluent, fashion-conscious customers gave sales of luxury furs a healthy boost in most stores. The gain in 1982 was mainly a gain in real terms, as there were actual declines in the prices of fur pelts, particularly mink--the largest selling fur--which offset some increases in other types of furs, notably fox.

RETAIL SALES

Retail Sales of Fur Apparel in the U.S., 1974-1982
(Millions of Dollars)

1982	1981	1980	1975	1974
$ 1,078	$ 1,027	$ 944	$ 525	$ 441

Source: American Fur Industry

Fur business was generally better than expected in 1982, particularly toward the end of the year. The underlying impetus to sales noted in recent years still had an impact--including the importance of furs in the wardrobes of the rapidly expanding number of career/professional women and the growing popularity of furs among young women. In past years furs were mainly worn by older women and were usually not purchased by women themselves, but by a male. Now the reverse is true. There is now a great variety of styles in furs, offering a wide choice, and many women are building fur wardrobes.

Another dimension to the retail market has been added in sales of furs to men. While this still represents only a small part of the total retail market, interest in men's furs is growing and sales are expected to take an increasingly large share as the economy improves.

The latest official figures on fur sales by type of retail outlet are from the 1977 census of retail trade compiled by the U.S. Bureau of the Census. Sales figures include re-modeling and repair work done by furriers.

Furriers & Fur Shops, 1972, 1977

Number		Sales (Thous.$)	
1977	1972	1977	1972
1,887	2,018	$322,345	$199,478

Source: U.S. Bureau of the Census, Census of Retail Trade, 1977, 1972

RETAIL SALES

Reported Sales of Women's Furs & Fur Garments By Store Type (Not Including Furriers), 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's furs & fur garments	8,486	100.0%	$ 364.6	100.0%
Department stores**	3,231	38.1	164.6	45.2
Women's ready-to-wear stores	4,352	51.3	171.7	47.1
Family clothing stores	857	10.1	27.8	7.6
Children's wear stores	46	0.5	0.5	0.1

*Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data.

Source: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC 77-L.

Where furs are sold in department and specialty stores leased fur departments account for most of the retail sales. However, department stores no longer dominate fur retailing as they did in the past, except for a few exceptional stores which are targeting their promotions to a select clientele mainly for luxury furs.

Moving into this void are fur manufacturers, particularly in New York, who are greatly increasing their activities as retailers, in order to obtain a faster turnover of stock. Large-scale weekend promotions in hotel ballrooms, off-price promotions, leased fur departments in discount outlets are among the stepped-up retail activities of manufacturers, some of whom now report that retail operations move up to 75% of their stock.

Another new development has been the selling of furs by mail and Spiegel has issued a special fur catalog. According to the American Fur Industry, there are currently 7,400 retail establishments in the U.S. selling furs.

Department Stores

Fur departments in department stores with a total volume of $1 million or more registered a median gain of 12.8% in 1981 over 1980, according to the National Retail Merchants Association. Sales per square foot averaged $203, compared with $153 in 1979, and the fur department accounted for a typical 1.5% of total sales of the adult women's apparel division in 1981, up from 0.8% in 1979.

RETAIL SALES

Department Stores

Merchandising & Operating Results in Fur Departments, 1981
(Median Results for Department Stores With Sales Over $1 Million)

Net sales, % change from 1980	+ 12.8%
Net sales, % of adult female apparel	1.5
Net sales, % of total store sales	0.4
$ sales per sq. ft. of selling space (main or largest selling unit)	$203.3
Cumulative markon, %	44.7%
Gross margin, % of net sales (including cash discounts)	38.8
Markdowns, retail, % of net sales	16.4
Number of stock turns (times)	1.4
Salespeople's salaries, % of sales (main or largest selling unit)	7.6
Sales promotion, % of net sales	3.4

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981, (1982 Edition)

Percent of Department Store Sales of Women's Furs
5 Year Average, By Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
Furs	8.4	6.0	6.1	6.1	4.3	2.4	4.1	9.0	7.9	12.4	13.1	20.2	100.0%

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data-1961-1965, (latest available).

RETAIL ADVERTISING

Seasonality in Retailers' Newspaper Advertising Linage
On Women's Furs & Fur Garments, 1979, 1981

Furs & Fur Garments	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Year
1981	14.6	11.1	7.7	2.8	3.6	1.8	4.1	9.2	9.2	8.6	12.9	14.4	100.0%
1979	10.4	8.4	6.2	4.3	2.5	1.6	4.9	10.2	9.8	11.1	17.0	13.6	100.0%

Source: Advertising Checking Bureau, Neustadt Reports Division, covering retail newspaper linage in seven cities.

(For Consumer Buying Habit information on furs, see pages 23 and 24.)

FAIRCHILD FACT FILES AVAILABLE FOR 1983

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (May)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00) (June)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.22

Personal Electronics

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director
Jeffrey Olwell, Research Analyst
Gregory Becker, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

NOTE: The term "consumer electronics" covers a rapidly expanding, diversified group of products, including computers, electronic calculators, home entertainment and communications systems, and home security products. Because many of the included manufactures are not separately reported in government industry statistics, but are "lost" in broad figures that include manufactures for larger industrial/commercial markets, it has been found necessary to divide this Fact File into two parts. Part I covers the fast emerging components of the consumer electronics market which are not reported as separate industries in government statistics--including personal computers, calculators, and video games. Part II covers products such as home entertainment items for which industry data as covered in the Standard Industrial Classification system primarily represents manufactures for home or personal use.

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In most instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright©1983 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-458-9

Printed in the United States of America

TABLE OF CONTENTS

Page

CONSUMER ELECTRONICS

MARKET TRENDS.......... 1

PART I
PERSONAL COMPUTERS, ELECTRONIC CALCULATORS & VIDEO GAMES

MARKET TRENDS.......... 2
SHIPMENTS--PERSONAL COMPUTERS.......... 3
LEADING MANUFACTURERS--PERSONAL COMPUTERS.......... 5
FOREIGN TRADE--IMPORTS.......... 6
FOREIGN TRADE--EXPORTS.......... 7
THE POTENTIAL MARKET.......... 8
RETAIL SALES--PERSONAL COMPUTERS.......... 8
RETAIL SALES BY TYPE OF OUTLET--PERSONAL COMPUTERS..........13
CONSUMER BUYING HABITS--PERSONAL COMPUTERS..........14
SHIPMENTS--ELECTRONIC CALCULATORS & VIDEO GAMES..........21
APPARENT CONSUMPTION--ELECTRONIC CALCULATORS..........22
RETAIL SALES--VIDEO & ELECTRONIC GAMES..........23
CONSUMER BUYING HABITS--VIDEO GAMES..........23
CONSUMER BUYING HABITS--ELECTRONIC CALCULATORS..........27

PART II
HOME ENTERTAINMENT PRODUCTS & SYSTEMS, COMMUNICATIONS PRODUCTS & HOME SECURITY SYSTEMS

GENERAL INDUSTRY STATISTICS..........28
  EMPLOYMENT & EARNINGS..........30
  INDUSTRY CONCENTRATION..........30
  OPERATING RATIOS..........31
SHIPMENTS..........32
APPARENT CONSUMPTION..........38
PRODUCER PRICES..........39
FOREIGN TRADE--IMPORTS..........39
FOREIGN TRADE--EXPORTS..........42
THE SIZE OF THE POTENTIAL MARKET..........44
RETAIL SALES BY PRODUCT..........46
RETAIL SALES BY STORE TYPE..........49
RETAIL ADVERTISING..........51
CONSUMER PRICE TRENDS..........51
CONSUMER BUYING HABITS..........52

SCHEDULE OF ADDITIONAL FACT FILES..........57

CONSUMER ELECTRONICS

Market Trends

The consumer electronics market is one highly dependent on innovation and changing technology in order to create growth. Starting in the latter 1970's, changes have been coming at such an extraordinarily fast pace that manufacturers are having difficulty keeping up. The Electronics Industry Association estimates that retail sales of consumer electronics stood at about $17 billion in 1981. As the recession of 1981-1982 deepened, consumers became less free with their disposable income and industry analysts generally estimate that total retail dollars in 1982 remained about even with the previous year.

The structure of the consumer electronics industry has changed dramatically over the last two decades and these rapid changes are continuing. Presently, color television sets are the primary product, accounting for more than half of total shipments in 1982. As the personal computer boom continues, and consumers become more aware of the utility of computers, industry analysts estimate that within a few years they will account for a major share of spending for consumer electronics.

Competition is extremely keen, with low cost foreign producers now dominating the consumer electronics market world-wide. It is estimated that imports now account for about half of all sales in the U.S., with almost 85% of these imports coming from the Far East. Domestic producers are relying on innovation in features on their products to compete with the lower priced imports.

Rapidly changing technology has generally kept price increases within the consumer electronics industry at a minimum. Consumer prices for television, as an example, actually declined between 1980 and 1982, despite a sharp rise in the overall consumer price index.

Although many of the individual products in the consumer electronics industry have reached the saturation point and are dependent on replacement sales, there are a wide variety of products within the industry which show the possibility for tremendous sustained growth. Examples of these are video cassette recorders which are in only 5% of all households; home computers, 2%-4%; component stereos, 31.2%.

The future of the consumer electronics industry seems bright to almost all industry analysts. The dual-income household has increased dramatically over the last few years and the trend is for this growth to continue well into the future. This, along with the decision of many couples to delay parenthood and/or to have fewer children, has pushed disposable income up dramatically. As the U.S. economy recovers from the recession in 1983, industry insiders believe that they will be one of the major beneficiaries of the expected spending boom.

The U.S. Bureau of Economic Analysis (1983 Industrial Outlook) estimates that between 1983 and 1987, factory shipments of the home entertainment segment of the industry should grow at a 4.9% compound annual rate. The major reason cited by the Bureau for this future growth is the use of new video products, systems and services for home entertainment and information, and the replacement of older TV receivers with new ones of current designs.

Part I

PERSONAL COMPUTERS, ELECTRONIC CALCULATORS & VIDEO GAMES

Market Trends

The big surge in personal computer sales which started in 1982 will continue to snowball through 1983 and into the foreseeable future. Industry analysts cite two major reasons for the increased sales: the rising number of outlets carrying the machines (including traditional retailers such as department stores, discount stores, toy stores, etc.) and the greater availability of software which is expanding the usefulness of the computer. Many observers have likened the personal computer sales boom to that of television sets in the late 1940's and early 1950's, when sales shot up as more programming was initiated.

Currently, businesses account for roughly 80% of personal computer sales. But with 84 million households in the U.S., only 4% of which already own computers, the potential for this segment is apparent. A January 1983 survey by one computer manufacturer revealed that while 83% of those surveyed were interested in computers, 85% had no plans to buy one, primarily because they did not know how to use it. Exposure to computers in work or school will help overcome this sales obstacle. In fact, 10 home computers are sold for every one found in a classroom, according to a leading manufacturer.

Low-priced, under-$100 computers, dubbed "computer literacy machines" by the industry, will also help introduce the computer age into the household. These machines are easy to use and serve to whet the appetite of the typical user for a more expensive computer with a greater range of functions.

To ensure that computers will become a home staple item rather than a short-lived novelty, a compelling reason for its use must emerge. In 1983, more than half of home computer owners used their machines for game-playing. The videotex concept, currently in the test stages, may provide the answer. This system allows the user to do a plethora of chores, such as home banking and shopping and information retrieval, in a minimum amount of time. It may also allow white-collar employees the opportunity to work at home while still being connected with the office. Market researchers Frost & Sullivan project that as much as 25% of the 1990 white-collar workforce will work from a home terminal.

The continued sales strength of the home computer market may have a negative effect on the market for home video games. In the first quarter of 1983, sales of video game consoles and cartridges were reported to be sluggish. Manufacturers in this $3 billion (in 1982) industry are fighting back by offering consumers improved graphics, voice recognition and synthesis and 3-D effects on their latest models. Many are also delving into the home computer area themselves, by producing equipment which will turn an existing video game console into a home computer or selling entirely new units. Because of the competition from computers, estimated unit sales of game consoles were expected to drop to 5 million units in 1983 from 7.7 million units in 1982. Game cartridges will show an increasing reliance upon licensed movie, TV and arcade game characters, considered a "presold" market, for future sales growth.

Part I

PERSONAL COMPUTERS, ELECTRONIC CALCULATORS & VIDEO GAMES

Market Trends
(continued)

Because of the relative newness of the personal computer and video game industries, there are no separate industry statistics available from the Bureau of the Census on the personal computer or video game industries. These emerging industries are included in broad existing Standard Industrial Classification (SIC) codes. The information generated on these SIC codes, therefore, are more a reflection of the older industries and do not represent an accurate picture of the personal computer or video game manufactures. With the exception of information on electronic calculators, most of the material in the manufacturing section of this part of the Fact File comes from other than government sources.

PERSONAL COMPUTERS

SHIPMENTS

Consoles

Future Computing, a Dallas firm which specializes in personal computer research, produces yearly estimates of total U.S. shipments of personal and home computers based on surveys of computer vendors and retailers. Their 1983 projections and prior year estimates indicate the tremendous growth in shipments of these machines over the past few years.

Forecasted 1983 personal computer shipments are, at 4.45 million units, double the estimated 1982 figure and more than a five-fold increase over 1980. Projected home computer shipments in 1983 will rise 132% above the 1982 level, according to Future Computing. In 1983, home computer shipments will account for 68.5% of shipments of personal computers retailing for $3,000 or less.

Estimated Shipments of Personal & Home Computers
By Retail Price Points, 1980-1982 & Projections for 1983
(Thousands of Units)

	1983 (pro.)	1982	1981	1980	% Change 1983/1982
Under $1,000 at retail					
Personal computers	3,500	1,500	235	85	+ 133.3%
Home computers	2,905	1,200	165	55	+ 142.1
$1,000 - $3,000 at retail					
Personal computers	950	700	440	250	+ 35.7
Home computers	143	112	79	58	+ 27.7

(pro.) = projected.

Source: Future Computing,
Dallas, Texas,
December 1982

SHIPMENTS

Peripherals

U.S. shipments of peripherals in 1983 are projected by Future Computing to be worth $985 million, a 103.9% jump over the $483 million 1982 shipment value. In units, over 9.5 million peripherals are expected to be shipped in 1983 by U.S. producers, almost one and a half times the 1982 shipment quantity. Joysticks will account for over half of this total quantity but only 6% of the total shipment value. Better than a quarter (27.3%) of the 1983 shipment value will come from shipments of floppy disks.

Estimated Quantity & Value of Home Computer Peripheral Shipments, 1981, 1982 & Projections for 1983

	Quantity (Thous. Units)			Value (Mil. $)		
	1983 (pro.)	1982	1981	1983 (pro.)	1982	1981
Peripheral shipments, total	9,567	3,869	633	$ 985	$ 483	$ 145
Joysticks	5,197	1,994	273	59	27	5
Cassettes	2,585	1,080	148	134	60	9
Floppy disks	571	290	100	269	152	61
Matrix printers	538	223	44	228	111	32
Monitors	338	155	41	120	58	15
Modems	226	89	19	57	24	6
Letter quality printers	103	34	6	108	47	14
Plotters	9	4	2	10	4	3

(pro.) = projected.

Source: Future Computing,
Dallas, Texas
December 1982

Software

Future Computing projections of the 1983 shipment value of software for home computers show a 140% gain over the 1982 shipment value to $683 million and a 169% increase in the number of units shipped by U.S. manufacturers. In 1983, entertainment software will represent 62% of total unit shipments but a lesser 49% of the shipment value. Education software is projected to display the largest growth rate between 1982 and 1983 -- close to a 200% rise in both the quantity and value of shipments.

PERSONAL COMPUTERS

SHIPMENTS

Software

Estimated Quantity & Value of Home Computer Software Shipments By Type of Application, 1981, 1982 & Projections for 1983

	Quantity (Thous. Units)			Value of Shipments (Mil. $)		
	1983 (pro.)	1982	1981	1983 (pro.)	1982	1981
Total software shipments	17,761	6,592	1,639	$ 683	$ 284	$ 77
By Type of Application:*						
System	468	266	87	47	29	11
Productivity	1,315	625	155	109	55	18
Home business	783	336	67	65	28	6
Scientific-engineering	316	154	34	19	9	3
Education	3,814	1,317	247	106	36	7
Entertainment	11,065	3,894	1,049	337	127	32

* Explanation of application headings:

System - Basic software package which is usually purchased at the same time as hardware. Contains the operating language which enables other software programs to work on the computer.
Productivity - Software which helps the user save time in performing tasks. Examples are word processing, spread sheets, data bases and graphics programs.
Home business - Similar to productivity software, but not quite as powerful.
Scientific-engineering - Higher level software. Used for scientific measurement and designing engineering specifications, for example.
Education - Teaches something to the user.
Entertainment - Game playing software, from adventure to strategic games.

(pro.) = projected.

Source: Future Computing
Dallas, Texas,
December 1982

LEADING MANUFACTURERS

The number of firms manufacturing personal computers has risen dramatically in the last few years as the personal computer began to take root in American society. In 1975, there were only 5 U.S. manufacturers. By 1980, their number had increased to about 25, and in 1982, close to 150 manufacturers were producing personal computers. Sales in the under-$1,000 computer market, the price range at which most home computers are sold, are dominated by four firms--Texas Instruments, Timex/Sinclair, Commodore and Atari--according to trade sources. Many industry observers expect a shakeout among manufacturers to streamline the industry in the near future.

Intense competition, marked by a round of severe price cutting in mid 1983, led many industry analysts to question the profitability of home computers at under-$500 price points.

PERSONAL COMPUTERS

LEADING MANUFACTURERS

Estimated Market Share of the Leading Manufacturers In the Under-$1,000 Personal Computer Market, 1982

	Estimated 1982 Share
Texas Instruments	35%
Timex/Sinclair	25
Commodore	19
Atari	15

FOREIGN TRADE

Imports

In 1982, the import value of electronic calculators fell 15.4% to $121.2 million compared with $143.3 million in 1981. The quantity imported declined 4.5% to 21.3 million units versus 22.3 million the year before. Imports of home video game hardware and video cartridges (which are not reported separately in the import statistics) were valued at $216 million in 1982, 21.7% higher than a year earlier.

The Department of Commerce does not provide a breakdown of personal computer imports but rather places them in a category with all digital stand-alone computers. Imports of these types of computers exceeded 1 million units in 1982, more than double the 1981 number, and were valued at $341.2 million, a 43.6% increase over 1981.

The Japanese, a significant force in the U.S. consumer electronics industry, have yet to make an impact on the personal computer marketplace. A major push for a share of this industry by the Japanese is anticipated by early 1984. However, industry analysts believe they will have trouble making inroads due to a lack of software support.

Meanwhile, the Japanese have concentrated their efforts in the computer peripheral market. It is estimated that half of the low-speed, dot-matrix printers associated with personal (and especially home) computers sold in the U.S. in 1982 were of Japanese manufacture, up from a mere 6% in 1980.

Imports of Personal Computers, Electronic Calculators, Video Game Units & Cartridges, 1981, 1982

	Quantity (Thous. Units)			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Digital machines with a CPU & input/output capability in a single housing**	1,042.1	475.3	+ 119.2%	$341.2	$237.6	+ 43.6%

(continued)

FOREIGN TRADE

Imports

Imports of Personal Computers, Electronic Calculators, Video Game Units & Cartridges, 1981, 1982
(continued)

	Quantity (Thous. Units)			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Game machines other than coin or disc operated, nes, & parts thereof***	na	na	--	$215.6	$177.2	+ 21.7%
Hand-held (pocket-type) electronic calculators	21,331.8	22,333.1	- 4.5%	121.2	143.3	- 15.4

nes = not elsewhere specified.

* The C.I.F. value (cost, insurance, freight) refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at first port of entry in the U.S.

** Includes personal computers as well as small business machines but does not include large mainframe computers.

*** Includes all home video game units as well as video game cartridges.

Source: U.S. Department of Commerce,
FT 246, December 1982, 1981.

Exports

Exports of all types of digital stand-alone computers (including personal computers) fell 4.6% in value to $899.9 million even though the number of units exported rose to 216 thousand units, a 43.9% jump over 1981. In 1982, the export value of home video game systems and game cartridges was $134.5 million, up 19.1% over the 1981 value. Hand-held electronic calculators gained 26.1% in export value to $22 million.

Exports of Personal Computers, Electronic Calculators, Video Game Units & Cartridges, 1981, 1982

	Quantity (Thous. Units)			Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Digital machines with a CPU & input/output capacity in a single housing**	215.6	149.8	+ 43.9%	$899.9	$943.7	- 4.6%
Game machines other than coin or disc operated, nes, & parts thereof***	na	na	--	134.5	112.9	+ 19.1

(continued)

FOREIGN TRADE

Exports

Exports of Personal Computers, Electronic Calculators, Video Game Units & Cartridges, 1981, 1982
(continued)

	Quantity (Thous. Units)			Value* (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Hand-held (pocket-type) electronic calculators	529.5	470.6	+ 12.5%	$22.2	$17.6	+ 26.1%

nes = not elsewhere specified.

* The export value is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. As defined, the value excludes the cost of loading the merchandise aboard the carrier and also excludes freight, insurance and other charges incurred beyond the port of exportation.

** Includes personal computers as well as small business machines but does not include large mainframe computers.

*** Includes all home video game units as well as video game cartridges.

Source: U.S. Department of Commerce,
FT 446, December 1981, 1982

THE POTENTIAL MARKET

Various trade sources have placed the market penetration level of video games at around 17% of U.S. households and a smaller 2-4% for home computers. By 1990, expectations are that home computers will be in 20-40% of American households.

Currently, households with home computers tend to be headed by a person in the 25-44 year old age bracket, based on recent survey data. Households containing children under the age of 18 also seem more likely to own a home computer and/or a video game than households without children.

In 1981, over 32.5 million households included at least one child under 18. Between 1980 and 1981, households headed by someone 35-44 years old increased by 6% to 15.3 million, while median income in this household type reached $27,044, a 7.7% rise over 1980. (See table, p. 46)

RETAIL SALES

PERSONAL COMPUTERS

Consoles

While estimates on the number of personal computers sold in 1982 vary from source to source, best estimates place sales at around 3 million units worth roughly $4.8 billion. These sales figures are approximately double 1981 sales of 1.4 million units valued at about $2.35 billion. Home computer sales are expected to explode upward in 1983 by all accounts, but considerable differences exist among estimates. They range from a low of 4 million units to a 6 million unit top, with the retail value in the neighborhood of $6-8 billion. One leading researcher in the industry estimates personal computer sales in the table below.

Consoles

Estimated Retail Sales of Personal & Home Computers In the U.S., 1979-1982 & Projections for 1983 (Billions of $)

	Personal Computers				Home Computers			
	1983 (pro.)	1982	1981	1980	1983 (pro.)	1982	1981	1980
Hardware market	$ 8.0	$ 4.8	$ 2.3	$ 1.2	$ 2.0	$ 0.9	$ 0.2	$ 0.1
Software market	1.8	1.0	0.4	0.2	0.6	0.3	0.08	0.04

(pro.) = projected.

Source: Future Computing,
Dallas, Texas,
December 1982

The personal computer market is actually made up of 4 distinct segments. Sales to major corporations constituted about 25% of dollar sales in 1982, educational institutions represented 10%, small businesses, governments and others accounted for another 45% and the home computer market was responsible for 20% of personal computer sales in dollars. The Eastern Management Group, a New Jersey market research firm, estimates that by 1982 2 million home computers were installed in U.S. households, twice the 1981 number.

Peripherals

In 1982, home computer peripheral equipment sales accounted for 50% of the estimated $1.2 billion home computer market, according to Future Computing. At the present time, peripherals are sold separately from the computer itself. Depending on the equipment desired, expenditures for peripherals can often equal or exceed the price of the basic console. In mid-1983, computer manufacturers were beginning to package their console units with the most popular peripherals, a technique known as "bundling", to promote sales.

Control products (joysticks, trackballs & paddles) are expect to be a big growth area in the coming years. Approximately 1.5 million of these products were sold in 1982, worth an estimated $20 million at retail, compared with only 320,000 units in 1981 at a retail value of about $4 million. Sales estimates for 1983 range between 2 and 3.5 million units sold, worth around $22-38 million.

According to Future Computing, peripherals accounted for 64% of sales in the estimated $860 million home computer hardware segment in 1982. The remaining 36% of sales in the category went for home computer consoles. Projections made by Future Computing in December 1982 indicate that peripherals will grab a larger share of the home computer hardware market and by 1987 will account for 74% of sales compared with 26% for consoles. Letter quality printers are expected to show the biggest growth during this five-year period, from 5% of the 1982 hardware expenditures to 9% of the much larger 1987 market.

Peripherals

Estimated Percent of Sales of Selected Peripherals In the Home Computer Hardware Market, 1982, 1987

	1987 (pro.)	1982
Home computer consoles	36%	26%
Floppy disks	18	18
Matrix printers	13	14
Cassettes	7	7
Monitors	7	7
Letter quality printers	5	9
Modems	3	5
Joysticks	3	5
Other peripherals, including speech input & output, music synthesizers, light pens, etc.	8	9

Source: Future Computing,
Dallas, Texas,
December 1982

Software

Personal computer software sales reached $1 billion in 1982, including about $280 million spent for home computer software. For 1983, sales of personal computer software are expected to climb to $1.8 billion. Future Computing estimates that home computer software accounted for a quarter of overall 1982 sales in the home computer market. Indicative of its growing importance, Future Computing expects home computer software to capture a 46% share of the total market by 1987.

According to the Eastern Management Group, a New Jersey research firm, the top 4 software applications for home computers are: games, financial planning, education and banking. A January 1983 Gallop Poll of home computer owners found that 51% used it for game playing. Almost half (46%) did business or office homework on it while 42% used it as a learning tool for adults and/or children.

Estimated Retail Sales of Software Products by Application, 1982

	1982	
	Mil. $	% of Total
Home computer software market, total	$ 280	100%
By Type of Software:*		
Entertainment	126	45
Productivity	56	20

(continued)

Software

Estimated Retail Sales of Software Products by Application, 1982
(continued)

	1982	
	Mil. $	% of Total
By Type of Software:* (cont'd.)		
Education	$ 34	12%
System	28	10
Home business	28	10
Scientific-engineering	8	3

* Explanation of application headings:

Entertainment - Game playing software, from adventure to strategic games.
Productivity - Software which helps the user save time in performing tasks. Examples are word processing, spread sheets, data bases and graphics programs
Education - Teaches something to the user.
System - Basic software package, usually pruchased along with console. Contains the operating language which enables other software programs to work on the computer.
Home business - Similar to productivity software, but not quite as powerful.
Scientific-engineering - Higher level software. Used for scientific measurement and designing engineering specifications, for example.

Source: Future Computing,
Dallas, Texas,
December 1982

Videotex & Teletext

Videotex is an interactive (two-way) system which allows the user to conduct transactions, retrieve information, send or receive messages, do computations and, in some cases, accept software for limited time use via the telephone. While the initial uses of videotex are mainly for businesses, the home market represents a lucrative field for this service.

Many of the potential home uses of videotex, such as banking services and shopping, were still in the trial stages in mid-1983. However, an AT&T market study predicted that by 1990, between 7 and 8% of all U.S. households will have access to a videotex system, either through a home computer or TV set with a decoder.

To many industry observers, the programs available with videotex will make the home computer an indispensible household tool rather than a plaything. A two-year study of 700 households equipped with a free videotex system, conducted by management consultants Booz, Allen & Hamilton Inc. and concluded in late 1982, found that about two-thirds of the participants were willing to pay $15 a month for the service. Among the most popular programs were household budgeting, personal calendars, games,

Videotex & Teletext

education, banking, shopping, travel reservations, monitoring or burglar and fire alarms and electronic messages.

Teletext is easier to use than videotex because it is strictly a one-way system. It can be used to impart news and weather information and provide subtitles, as well as captions for the hearing-impaired, on TV screens with the use of a decoder. According to the Videotex Industry Association, teletext will be used in 33 to 50% of U.S. households by 1990.

Portable Computers

Continued breakthroughs in size and weight reduction of computer components have opened up the market for portable computers. The basic technology for these machines include a microprocessor which serves as a CPU (central processing unit), a memory, programmability, display and storage space. As defined by Frost & Sullivan in a 1983 study on the market for portable computers, there are two main types: integrated portable computer systems (introduced in 1981) and pocket/briefcase computers (first sold in 1980).

Integrated portable computer systems, dominated by the Osborne Computer Corporation, is a system which typically weighs under 30 pounds and can be carried complete in a single carrying case. Frost & Sullivan estimates that sales of these systems will soar to about $2 billion in 1987 compared with $3 million in 1982. From 1983 through 1986, the compound annual growth rate of integrated portables will approach 47% in dollar terms and 84% in units. A small-scale survey of Osborne portable computer owners, conducted by Frost & Sullivan, found that the most popular uses for these machines were as word processors and for accounting procedures.

Pocket/briefcase computers (excluding programmable calculators) typically weigh less than 2 pounds and often are sold with a built-in battery pack. Nearly all models have the ability to transfer stored information to a larger computer system. Japanese calculator manufacturers are the major manufacturers in this category so far. Sales of pocket/briefcase computers are expected to rise at a 47% compound annual rate from 1983 to 1986 and reach $978 million in sales by 1987.

Estimated Retail Sales of Portable Computers, 1981, 1982 & Projections for 1987

	Quantity (Thous. Units)			Value (Billion $)		
	1987 (pro.)	1982	1981	1987 (pro.)	1982	1981
Integrated portable systems	3,100	130	8	$ 2.1	$ 0.3	$ 0.1
Pocket/briefcase computers	5,365	425	250	978.0	141.0	63.0

(pro.) = projected.

Source: Frost & Sullivan, Inc.
The Markets and Competitive Environment For Portable Computers, March 1983

RETAIL SALES BY TYPE OF OUTLET

PERSONAL COMPUTERS

Because of the relative newness of the home computer and video game markets, there are no government-released statistics on retail sales by outlet type. Various trade observers have tabbed the number of traditional retail outlets (including Radio Shack) selling computers at between 15,000 and 20,000 in 1982. Additionally, there were approximately 2,000-3,000 computer specialty stores in operation in 1982. While there is some disagreement among industry researchers on the percent of computer sales held by the different outlet types, all seem to agree that specialty stores accounted for close to half of all sales.

Based on an assortment of surveys of the personal computer market conducted by the International Data Corporation, Framingham, Ma., place of purchase does differ according to the intended use of the machine. Personal computer owners who bought a machine for home use are more likely to have done so via mail order (36%) than are those who bought them for small business or professional use (10%). According to IDC, six out of 10 home users purchased a personal computer at a computer specialty store compared with half of the small business and professional users.

Place of Purchase of Personal Computers
By Type of Usage
(Percent of Respondents)

	Home Use	Small Business/ Professional Use
Computer specialty store	50%	60%
Mass merchandiser	4	--
Mail order	36	10
Direct sales from manufacturers	7	12
Wholesale/distributor	4	10
Other	3	10

Note: Totals add to more than 100% due to multiple responses.

Source: International Data Corporation,
Framingham, Ma.

Analysts also agree, however, that a decline in sales share of computer specialty stores to around 40% of the market is imminent as the traditional retail outlets get more accustomed to selling computers. In 1983, computer specialty stores have a big edge over their retailing counterparts due to their superior computer knowledge and their eagerness to provide services such as training and education.

The number of computer specialty stores in operation continued to mushroom well into 1983 with no end to their proliferation in sight. For example, ComputerLand, one of the largest computer chains in the country (425 stores in early 1983) has more than doubled in size since 1981. As of mid-1983, the chain's expansion plans call for opening 10-15 new stores per month.

RETAIL SALES BY TYPE OF OUTLET

PERSONAL COMPUTERS

An April 1982 report which analyzed sales in computer specialty stores surveyed by Future Computing, Dallas, Texas broke down sales in a typical store as 74% hardware, 15% software and 11% other merchandise (including service, training, books and supplies). The personal computer system itself accounted for 43% of total store sales in the average unit surveyed.

Sales Mix in Computer Specialty Stores

	% of Total Store Sales
Personal computer systems	43%
Printers	15
Software	15
Add-on disks	9
Other hardware	4
Displays	3
Service	3
Supplies	3
Miscellaneous (including books & training)	5

Source: Future Computing,
Dallas, Texas
April 1982

A first quarter 1983 survey of 1,700 computer specialty stores found that sales in these stores were highest during the last quarter of the year, rising from 9.1% in October to 9.9% in November before reaching the December peak of 14.1% of total yearly sales.

Percent of Total Sales Done Each Month
In Computer Specialty Stores, 1982

	Total	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
% of sales	100.0%	6.3%	6.4%	7.3%	6.8%	7.0%	8.0%	8.2%	8.9%	8.0%	9.1%	9.9%	14.1%

Source: Future Computing,
Dallas, Texas

CONSUMER BUYING HABITS

PERSONAL COMPUTERS

In 1982, 3.2% of a nationally-representative panel of 70,000 U.S. households bought a personal computer compared with only 0.7% of the panel in 1981, according to a recent (January 1983) semi-annual survey undertaken by the TRAC Division of NFO Research's Personal Computer and Video Game Monitor Service program. Of those households which bought a computer in 1981 or 1982, 78% employ it strictly for personal use, 16% use it for business only and the remainder split its usage between the two. Asked about their buying intentions for the immediate future, 3.2% of the households said they intend to buy a personal computer during the January to June 1983 period.

Fully half of the households which bought a personal computer in 1981 or 1982 are headed by someone from 35 to 49 years of age. Households with incomes under $40,000 contained two-thirds of the personal computers bought in the two years prior to the survey. Households in the south accounted for 30% of personal computer sales.

Demographic Profile of Households
With Personal Computers, 1981, 1982

	Total	Personal Computers Purchased in: 1982	1981
Household Income:			
Under $25,000	33.2%	34.3%	27.5%
$25,000-39,999	33.0	32.7	34.2
$40,000-$49,999	14.4	14.4	15.0
$50,000 & over	19.4	18.6	23.3
Age of Household Head:			
Under 25 years old	4.0	4.1	2.7
25-34 years old	23.4	23.4	23.3
35-49 years old	50.1	49.9	52.2
50-64 years old	18.5	18.9	17.3
65 years old & over	4.0	3.7	4.5
By Region:			
Northeast	24.2	24.4	24.2
North	22.8	22.6	23.7
South	29.6	30.8	25.0
West	23.3	22.2	27.1

Source: TRAC Division,
NFO Research, Toledo, Oh.

The average income of a household with a personal computer purchased in 1981 or 1982 is $34,908, according to the TRAC survey. Households with incomes of $50,000 bought 37.5% of personal computers which cost at least $2,000 and only 13.5% of units priced under $1,000. Nearly 90% of personal computers which cost under $1,000 were bought for personal use only.

CONSUMER BUYING HABITS

PERSONAL COMPUTERS

Household Income of Personal Computer Purchasers By Price, 1981-1982

Household Income	Brands Under $1,000	Brands $1,000 - $2,000	Brands $2,000 & over
Under $25,000	38.1%	21.4%	19.4%
$25,000-39,999	34.1	30.8	28.4%
$40,000-49,999	14.3	15.1	14.7
$50,000 & over	13.5	32.7	37.5
Total	100.0	100.0	100.0
Mean Income	$32,056	$41,106	$43,593

Source: TRAC Division,
NFO Research, Toledo, Oh.

The average price paid for a personal computer over the two-year period covered by the survey (1981-1982) was $785. Computer stores were the most popular outlets for personal computer purchases, followed by Radio Shack and catalog/mail order sales.

Place of Purchase of Personal Computers & Average Price Paid, 1981-1982

	Personal Computers	
	% of Unit Sales	Average Price Paid
Computer stores	18.8%	$ 1,589
Radio Shack	15.5	931
National chains	6.6	544
Sears	2.2	1,221
Penney	1.3	297
Ward	3.2	190
K mart	5.2	230
Toy stores	3.4	246
Catalog/mail order	11.7	300
All other outlets	38.7	726

Source: TRAC Division,
NFO Research, Toledo, Oh.

CONSUMER BUYING HABITS

PERSONAL COMPUTERS

Warwick Advertising in New York City contacted 15,000 nationally-representative multi-person households in October 1982 to uncover information about those who own a personal computer. The 10,816 respondents were almost evenly divided between male and female household heads.

Eight out of 10 computer-owning families surveyed contained an adult member who was involved with computers at their workplace. More than a third of households with personal computers have a child who uses a computer in school.

Households with children under 18 were more likely to own a personal computer than households without children of this age. Including respondents who said they would definitely or probably buy a personal computer in 1983, 11.8% of households with under-18 year old children will own a computer by the end of the year.

Personal Computer Ownership
In Households With & Without Children

	All Households	With Children Under 18 Years Total	Under 6 Years	6-12 Years	13-17 Years	No Children Under 18
Number of respondents	10,816	4,736	1,675	2,553	2,243	6,080
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Personal Computer Owners						
1983*	8.5	11.8	10.1	12.5	12.6	5.6
1982	3.7	5.1	3.9	4.9	6.0	2.5

*1983 percentages include all 1982 owners plus respondents who said they will "definitely" or "probably" buy a computer in 1983.

Source: Warwick Advertising,
Dimensions of the Electronics/Information/ Communication Revolution, February 1983.

PERSONAL COMPUTER SOFTWARE

Frost & Sullivan, a New York-based market research firm, conducted an examination of the personal computer market, excluding game-type and limited-usage machines (i.e. Times/Sinclair 1000, Commodore VIC-20) in late 1982. The survey respondents were 1,291 subscribers of either *Byte* or *Personal Computing* magazines. Of those surveyed, 83% owned their own personal computer. Only 18% of the respondents classified themselves as computer novices; the remaining 82% considered themselves either intermediates or experts in their handling of a personal computer.

At the time of their purchase of a personal computer, respondents bought an average of $1,910 worth of hardware and $608 worth of software. During their first year of ownership, respondents typically spent another $1,027 for hardware items and $439 for software. Eight percent of participants who owned computers did all of their own programming.

PERSONAL COMPUTER SOFTWARE

Amount Spent on Personal Computer Software Initially & During the First Year of Ownership

	Percent of Respondents	
Amount Spent on Software	Initial Purchase	Other First-Year Purchases
Less than $100	27.6%	27.0%
$100 - 249	23.5	28.2
$250 - 499	16.9	17.3
$500 - 999	16.5	18.4
$1,000 & over	15.5	9.1

Source: Frost & Sullivan, Inc.,
"The Personal Computer Software Market in the United States"
November 1982

Over half (51.6%) of the respondents to the Frost & Sullivan survey bought their software primarily in computer specialty stores, either chains or independents. Another 38.6% purchased software mainly through the mail.

Primary Place of Purchase of Personal Computer Software

	Percent of Respondents
Computer specialty stores	51.6%
Chains	29.8
Independents	21.8
Mail order	38.6
Trade show	1.2
Bookstore	1.2
College/university store	1.2
Department store	1.1
Other, including user groups, manufacturers, consultants, etc.	5.1

Source: Frost & Sullivan, Inc.,
"The Personal Computer Software Market in the United States"
November 1982

Based on the value of the initial software purchase and subsequent purchases throughout the first year of ownership coupled with Frost & Sullivan's estimate of the personal computer installed based (with the exclusions previously noted), word processing software sold in 1982 had a market value estimated at $48.4 million, more than any other software application. Spread sheets had the second highest estimated market value, $29.4 million.

CONSUMER BUYING HABITS

PERSONAL COMPUTER SOFTWARE

Forecasted Market Value of the Leading Software Applications, 1982, 1983

	Market Value At Retail (Million $) 1983	1982	% Change 1983/1982
Word processing	$ 81.5	$ 48.4	+ 68.4%
Spread sheets	49.7	29.4	+ 69.0
Entertainment	46.8	26.0	+ 80.0
Assembler	40.6	24.3	+ 67.1
Data base manager	37.7	22.9	+ 64.6

Source: Frost & Sullivan, Inc.,
"The Personal Computer Software Market
in the United States"
November 1982

Since their acquisition of a personal computer, respondents bought an average of $1,266 worth of business software programs.

Types of Software Programs Purchased & Average Total Expenditures

Type of Software Programs	Average Total Expenditures
Business	$ 1,266
Education	168
Entertainment	113
Home	116
Utility	219

Source: Frost & Sullivan, Inc.,
"The Personal Computer Software Market
in the United States"
November 1982

In April 1982, 8,000 Time magazine subscribers were asked to participate in a study undertaken for the magazine by Beta Research designed to uncover demographic information about personal computer and video game owners. Over two-thirds of the 3,657 respondents were below the age of 55 with total household incomes of at least $25,000. Almost a fifth (19.4%) own video games and 7.5% own a personal computer. An additional 6.9% of the respondents indicated that they are likely to buy a personal computer within a year.

Of the respondents who have purchased personal computers, 48% use it primarily in their home while another 12.8% split its usage between the home and the office.

CONSUMER BUYING HABITS

PERSONAL COMPUTER SOFTWARE

The median expenditure for personal computers intended primarily for home use was $1,455. Units selling for under $1,000, 70% of which were purchased for the home, cost a median $448.

Among the leading home applications of personal computers are games and hobbies, personal finance and writing and editing. A quarter of the respondents who purchased their computer less than a year prior to the survey have on-line security systems compared with only 9.9% of all personal computer owners.

Home Uses for Personal Computers & Desired Applications for the Future

	Have Now	Want Next		Have Now	Want Next
Games & hobbies	43.2%	1.5%	On line info systems	9.9%	15.4%
Personal finance, taxes	30.8	13.9	Kitchen management	5.1	5.5
Writing & editing	25.6	12.5	Home security	2.9	7.3
Home management	22.3	13.9	Energy control	2.2	8.1
Records & schedules	20.1	14.3	Recipes	1.8	1.5
Child education	19.0	8.8	Physical fitness program	1.5	4.8
Mailing lists	17.9	7.7	Other uses	1.5	0.8
Adult education	17.6	15.4	No answer	36.6	62.3
Median no. of uses	3.4	3.1			

PERSONAL COMPUTER PERIPHERALS

Creative Computing, a consumer publication focusing on the personal computer field, asked 2,000 subscribers in April 1982 about their use, ownership and purchase of microcomputers and related equipment. The survey, conducted by Beta Research, Syosset, N.Y., yielded 1,327 replies, a 67% response rate. Eighty-four percent of the respondents used a microcomputer at home for personal purposes, and almost half (48%) used one at home for business purposes. About three-quarters (74%) personally own a microcomputer.

Seven out of 10 respondents plan to buy a microcomputer and/or equipment in the 12 months following the survey. A fifth intend to purchase a microcomputer itself, 58% plan a purchase of at least one peripheral item and 43% expect to buy a floppy disk and/or a tape or tape cassette.

CONSUMER BUYING HABITS

PERSONAL COMPUTER PERIPHERALS

Percent of Respondents Who Plan To Buy Microcomputers and/or Equipment For Their Own Use

	% of Respondents
Any equipment	71%
Microcomputers	20
Peripherals (Net)	58
Printers (Net)	27
Line printer	18
Letter quality printer	10
Video equipment (Net)	17
Videoterminal	5
Video monitor	13
Drives (Net)	34
Floppy disk drive	29
Hard disk drive	5
Tape drive	2
Add-on memory	19
Modem	18
Music/voice synthesizer	7
Additional input/output or analog/digital	6
Graphics tablet	4
Plotter	2

Of those respondents to the Creative Computing survey who already own peripherals, 55% bought them at a computer store and 38% obtained them via mail order.

ELECTRONIC CALCULATORS & VIDEO GAMES

SHIPMENTS

U.S. electronic calculator shipments increased 2.6% in value to $488.9 million in 1981. The shipment value of hand-held electronic calculators (from the basic four-function machine to programmable, display and/or printing types) dropped 11.4% to $189.4 million.

Video game shipments from U.S. manufacturers surpassed the $1 billion level in 1981, soaring 129.4% above the 1980 shipment value of $452.2 million. According to trade sources, an estimated 27 million home video game cartridges were sold to retailers in 1981.

ELECTRONIC CALCULATORS & VIDEO GAMES

SHIPMENTS

Quantity & Value of Shipments of Electronic Calculators & Video Games by All U.S. Producers, 1980, 1981

	Quantity (Mil. Units)			Value (Mil. $)		
	1981	1980	% Change 1981/1980	1981	1980	% Change 1981/1980
Electronic calculators, total	na	na	--	$ 488.9	$ 476.4	+ 2.6%
Hand-held	10.5	12.9	- 18.6%	189.4	213.8	- 11.4
Desk-top Peripherals for electronic calculators	2.4	2.4	--	299.5	262.6	+ 14.0
Electronic games, total*	na	na	--	1,037.3	452.2	+129.4

na = not available.

* Includes arcade and amusement center types (except coin-operated), and home electronic games for attachment to TV receivers.

Source: U.S. Bureau of the Census, *Current Industrial Reports*, MA-36N(81) & MA-35R(81).

About 20 U.S. manufacturers make video game consoles. Atari held the largest market share in 1982, although it was not the overwhelming 70%-80% it had been two years ago.

ELECTRONIC CALCULATORS

APPARENT CONSUMPTION

The apparent consumption value of hand-held electronic calculators dropped 14.6% to $310.9 million in 1981 on a 9.1% decline in apparent consumption units to 32.4 million calculators. Imports accounted for two-thirds of the total quantity available in 1981 and 1980 but its share of apparent consumption value fell to 45% in 1981 from 49% the prior year.

Apparent Consumption of Hand-Held Electronic Calculators, 1980, 1981

	U.S. Shipments		U.S. Exports		Imports		Apparent Consumption	
	1981	1980	1981	1980	1981	1980	1981	1980
Quantity (Thous. Units)								
Hand-held (pocket-type)	10,512.5	12,871.2	470.6	678.2	22,333.1	23,423.9	32,375.0	35,616.9
Value (Mil. $)								
Hand-held (pocket-type)	$ 189.4	$ 213.8	$17.6	$28.9	$139.1*	$179.0*	$310.9	$363.9

*Represents the customs value, which is the selling price of the merchandise excluding U.S. import duties, freight, insurance and other charges incurred in bringing the merchandise to the U.S.

Source: U.S. Department of Commerce,
Current Industrial Reports, MA-35R (81)-1;
FT 246, 446 & 410

VIDEO & ELECTRONIC GAMES

RETAIL SALES

Video Games

Video game sales are expected to crack the $5 billion mark in 1983, significantly above the 1982 volume of approximately $3 billion. Sales of game cartridges will account for 60% of 1983 dollar sales with about 120 million game units sold, almost double the 65 million units sold in 1982. Eight million consoles were purchased in 1982, up from 4.5 million in 1981. The number of cartridges sold per console jumped to 9 in 1982 compared with an average of 6 two years earlier.

Video games can now be found in an estimated 14 million households, 17% of all U.S. households. An industry analysis by the investment firm of Sanford Bernstein & Co. concluded that the market penetration rate could hit 30% by 1986.

Hand-held Electronic Games

Hand-held electronic game sales reached their peak in 1980. Since that time, unit and dollar sales have fallen approximately 50% per year. This drop-off has been attributed to the emergence of video games. To restore health to this market segment, a palm-sized video game system was introduced in 1983. The system offers color graphics, 3-D effects and multiple skill levels.

CONSUMER BUYING HABITS

VIDEO GAMES

Almost 9% of the nationally-representative, 70,000 member TRAC panel purchased a video game in 1982, up from 5.7% the previous year. During the six-month period ended June 1983, 2.0% intended to buy a video game, according to the January 1983 survey. Households with incomes under $40,000 contained 83.3% of all video games sold. Almost 35% of video game purchases in 1981 and 1982 were to households in the southern U.S.

Demographic Profile of Households
With Video Games, 1981, 1982

	Total	Video Games Purchased in: 1982	1981
Household Income:			
Under $25,000	49.0%	53.5%	41.4%
$25,000-39,999	34.3	32.6	37.2
$40,000-49,999	8.9	7.5	11.1
$50,000 & over	7.8	6.4	10.3
Age of Household Head:			
Under 25 years old	5.6	6.1	4.9
25-34 years old	31.2	33.3	27.9
35-49 years old	47.6	44.8	51.8
50-64 years old	13.5	13.6	13.6
65 years old & over	2.1	2.2	1.8

(continued)

Demographic Profile of Households With Video Games, 1981, 1982 (continued)

	Total	Video Games Purchased in: 1982	1981
By Region:			
Northeast	23.5%	21.9%	26.1%
North	24.9	24.9	24.9
South	34.6	36.7	31.2
West	17.0	16.5	17.8

Source: TRAC Division,
NFO Research, Toledo, Oh.

The average price paid for a video game over the two-year period covered by the TRAC survey (1981-1982) was $149. A fifth of all video game sales were done in chain stores.

Place of Purchase of Personal Computers & Video Games & Average Price Paid, 1981-1982

	Video Games: % of Unit Sales	Video Games: Average Price Paid
Computer stores	0.3%	$ 139
Radio Shack	0.7	166
National chains	21.0	150
Sears	11.2	149
Penney	7.7	152
Ward	2.1	145
K mart	11.4	145
Toy stores	7.8	154
Catalog/mail order	7.3	146
All other outlets	51.5	146

Source: TRAC Division,
NFO Research, Toledo, Oh.

Four out of 10 households with children under 18 (including "probable" and "definite" 1983 buyers) in the October 1982 Warwick Advertising survey of 10,816 families will purchase a video game by 1984 compared with only 12.3% of all other households.

VIDEO GAMES

Personal Computer & Video Game Ownership In Households With & Without Children

	All Households	With Children Under 18 Years Total	Under 6 Years	6-12 Years	13-17 Years	No Children Under 18
Number of respondents	10,816 100.0%	4,736 100.0%	1,675 100.0%	2,553 100.0%	2,243 100.0%	6,080 100.0%
Video Game Owners 1982	24.6	40.5	31.8	44.0	45.1	12.3

Source: Warwick Advertising, Dimensions of the Electronics/Information/ Communications Revolution, February 1983.

Information on video game hardware and software and electronic games has been supplied by the Toy Market Tracking Service, a division of National Panel Diary (NPD) Special Industry Services. It is based on findings from an on-going monthly panel diary tracking the purchases of 13,000 nationally representative families.

According to this source, electronic handheld/tabletop game sales reached $500 million in 1982. Close to 21.5 million units were sold, with almost a quarter bought from discount stores.

Place of Purchase of Electronic Handheld/Tabletop Games, 1982
(Percent of Units Sold)

	1982
Discount stores	24%
National toy chains	21
Sears/Penney/Wards	13
Catalog showrooms	7
Toy stores, except national chains	5
Department stores	5
Variety stores	4
All other outlets, including mail order	22

The market for video game hardware was approximately $1.2 billion in 1982 on unit sales of 8.6 million machines, according to projections from the Toy Market Service. Almost 66.7 million game cartridges, worth an estimated $1.6 billion at retail, were sold in 1982. Discount stores were the most popular outlet types for both hardware and software.

VIDEO GAMES

Place of Purchase for TV Video Game Hardware & Software, 1982
(Percent of Units Sold)

	1982	
	Hardware	Software
Discount stores	31%	29%
Sears/Penney/Wards	23	18
National toy chains	9	9
Department stores	7	7
Catalog showrooms	6	6
Variety stores	2	2
All other outlets, including mail order	21	29

To uncover information about home video game ownership and usage, Newsweek magazine commissioned Factline, Inc., New York, to survey recent Atari and Mattel game purchasers in November 1982. All of the 579 respondents had bought a video game system within a year prior to the survey. The household income of the participants was a median $30,700. Almost 9 out of 10 respondents (88%) expressed satisfaction with their system. In addition to a video game unit, a quarter of the households also owned a videocassette recorder and 8.3% possessed a home computer.

On average, the video game system was used 8.5 hours a week. A fifth of the households used it more than 12 hours a week while 38% used it no more than 4 hours during an average week. Users averaged 25 years of age but tended to be slightly older (26.4 years) in households with total incomes of $35,000 and over. In these households, a third of the users were over 35 years old compared with 22.7% in $25,000-34,999 income households and only 17.0% in households with incomes under $25,000.

Almost three-quarters of the respondents considered the selection of games either extremely important or very important in the decision of which video game system to buy.

Factors Considered Extremely Important or Very Important In Influencing the Purchase Decision of a Video Game Unit

	% of Respondents
Has a wide selection of its own games	72.6%
Manufactured the video games we most wanted to play	65.6
Graphics/pictures were more real/life-like	62.1
Was the best value for the money	61.9
Had the best reputation for durability	55.6
Experienced manufacturer of video game equipment	52.7
Good sound effects	52.6
On sale at a reduced price	33.8
Looked attractive/good looking design	33.1
Could be used as a small computer	7.4

CONSUMER BUYING HABITS

VIDEO GAMES

Nearly 66% of respondents in the Newsweek survey felt that future video games systems should also be able to act as home computers. An almost equal number thought that future systems should come equipped with a voice synthesizer to imitate a human voice.

ELECTRONIC CALCULATORS

Almost three-quarters (72.2%) of the 981 persons interviewed in a Merchandising magazine poll conducted in shopping areas during January and February 1983 said they own an electronic calculator. Another 8.4% expect to purchase one in 1983. Mini-card, hand-held calculators are the most popular type. Of the 790 respondents who either own a calculator or expect to purchase one, 54.7% will buy, or already have, this type.

Type of Electronic Calculator Owned or Expected to Own, 1983

	Percent of Respondents*
Hand-held calculators	
Mini-card	54.7%
Scientific	19.1
Printer	15.3
Programmable	14.9
Other	0.3
Desk-top	
Printer & display	28.4
Display only	15.6
Printer only	12.9

*Total exceeds 100% due to multiple responses.

Source: Merchandising magazine,
May 1983.

PART II

HOME ENTERTAINMENT PRODUCTS & SYSTEMS, COMMUNICATIONS PRODUCTS & HOME SECURITY SYSTEMS

AT THE MANUFACTURER LEVEL

A major component of the consumer electronics market is in the home entertainment area--dominated now by color television sets. Many of these products--unlike those covered in Part I--are separately defined consumer products under the Standard Industrial Classification system, and are covered in Census Bureau and Department of Labor industry reports.

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. In intra-census years, the Bureau conducts an annual survey of a sample of manufacturers. Reports from these surveys are adjusted for comparability with findings in the complete Census.

The latest annual survey report covers operations in the year 1981.

GENERAL INDUSTRY STATISTICS

Radio & TV Equipment (SIC 365)
(Including all manufacturers classified in SIC 3651 & 3652)

	1981	1980	1979	1977
Number of companies	na	na	na	na
Number of establishments**	na	933	979	1,087
With 20 or more employees	na	323	351	309
Payroll (mil. $)	$1,323.3	$1,293.6	$1,256.3	$1,097.0
Value added by manufacture (mil. $)#	3,728.1	3,772.0	3,501.3	3,078.1
Value of industry shipments (mil. $)##	8,781.9	8,515.6	8,091.8	6,913.2
Capital expenditures, new (mil. $)	226.5	210.1	217.5	135.7

Radio & TV Receiving Sets (SIC 3651*)

	1981	1980	1979	1977
Number of companies	na	na	na	547
Number of establishments**	na	440	464	581
With 20 or more employees	na	208	216	192
Payroll (mil. $)	$1,038.4	$ 996.1	$ 945.7	$ 852.4
Value added by manufacture (mil. $)#	2,608.1	2,075.2	2,559.1	2,351.8
Value of industry shipments (mil. $)##	7,057.8	6,798.8	6,572.7	5,732.6
Capital expenditures, new (mil. $)	187.2	159.3	165.2	105.8

BEST AVAILABLE COPY

GENERAL INDUSTRY STATISTICS

Phonograph Records & Prerecorded Tapes (SIC 3652*)

	1981	1980	1979	1977
Number of companies	na	na	na	679
Number of establishments**	na	490	515	709
With 20 or more employees	na	115	135	133
Payroll (mil. $)	$ 285.0	$ 297.5	$ 310.6	$ 244.6
Value added by manufacture (mil. $)#	1,120.0	1,066.9	942.1	727.3
Value of industry shipments (mil. $) ##	1,724.4	1,716.8	1,519.1	1,181.7
Capital expenditures, new (mil. $)	39.3	50.8	52.3	29.8

na = not available
n.e.c. = not elsewhere classified
(e) = estimated

Standard Industrial Classifications (SIC) =

* SIC 3651 covers establishments primarily engaged in manufacturing electronic equipment for home entertainment, including auto radios and tape players. This industry includes establishments primarily engaged in manufacturing public address systems and music distribution apparatus. Establishments primarily engaged in manufacturing phonograph records and prerecorded tapes are classified in industry 3652. Establishments primarily engaged in manufacturing separate cabinets for home electronic equipment are classified in Major Group 25.

* SIC 3652 covers establishments primarily engaged in manufacturing phonograph records and recorded magnetic tape. Establishments primarily engaged in manufacturing electronic equipment for home entertainment, except records and prerecorded magnetic tape, are classified in Industry 3651.

** Each business location is counted as a separate establishment. Figures for 1979 and 1980 are from County Business Patterns. (U.S. Census Bureau)

# Value added by manufacturer is derived by subtracting the cost of products bought for resales without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others and is for most purposes the best value measure of individual industries.

## The value of industry shipments includes both primary and secondary products made by manufacturers in the industry, as well as receipts for contract work and miscellaneous receipts. The value of primary products made in the industry, as well as the value of these products made by secondary producers is reported in the tables on product shipments.

Source: U.S. Bureau of the Census
Census of Manufactures, 1977
Annual Survey of Manufactures, 1979, 1980, 1981

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average employment in the radio & TV receiving set industry fell dramatically during 1982, declining 11.8% to 94,600 workers during that period. Production worker employment during this same period showed an even greater decline falling over 15% from the 1981 mark to a total of 64,800 in 1982.

Despite the large decline in the work force in the industry in 1982, the number of hours worked weekly by production workers also showed a decline between 1981 and 1982 falling to an average of 38.6 in 1982 from 39.1 in 1981.

Employment & Earnings in the U.S. Radio/TV Industry

	Annual Averages			% Change
	1982	1981	1980	1982/1981
Radio & TV receiving equipment (SIC 365)				
All employees (thous.)	94.6	107.2	108.8	- 11.8%
Production workers (thous.)	64.8	76.3	78.6	- 15.1
Average weekly earnings	$ 297.20	$ 278.78	$ 249.10	+ 6.7
Average weekly hours	38.9	39.1	38.8	- 0.5
Average overtime hours	1.2	1.5	1.6	- 20.0
Radio & TV receiving sets (SIC 3651)				
All employees (thous.)	73.5	82.2	84.2	- 10.6
Production workers (thous.)	49.4	56.7	58.9	- 12.9
Average weekly earnings	$ 302.62	$ 286.30	$ 255.92	+ 5.7
Average weekly hours	38.6	38.9	38.6	- 0.8
Average overtime hours	1.1	1.5	1.6	- 26.7

Source: U.S. Bureau of Labor Statistics, *Employment & Earnings*

Industry Concentration

The home entertainment segment of the consumer electronics industry is characterized by a large number of small operations. Census Bureau data for 1980 showed a total of 933 manufacturing establishments in the industry (defined by SIC 365), of which 610 (65%) had fewer than 20 employees.

Industry Concentration

Number of Manufacturing Establishments by Employment Size, 1980

	Radio & TV receiving equipment (SIC 365**)		Radio & TV receiving sets (SIC 3651**)		Phonograph records (SIC 3652**)	
	Number	% of total	Number	% of total	Number	% of total
Total establishments*	933	100.0%	440	100.0%	490	100.0%
Employment size:						
Under 20 employees	610	65.4	232	52.7	375	76.5
20 to 49 employees	141	15.1	78	17.7	63	12.9
50 to 99 employees	60	6.4	38	8.6	22	4.5
100 to 249 employees	56	6.0	42	9.6	14	2.9
250 to 499 employees	35	3.8	25	5.7	10	2.0
500 or more employees	31	3.3	25	5.7	6	1.2

* = Includes only establishments with payrolls.
** = for definition of SIC codes see page 29.

Source: U.S. Bureau of the Census, County Business Patterns, 1980

On a regional basis, the home entertainment segment of the consumer electronics industry is highly concentrated in a few States. According to the U.S. Bureau of Industrial Economics (1983 U.S. Industrial Outlook), the major producing States accounting for the largest percent of shipments in the radio/TV receiving sets industry are Alaska, California, Georgia, Illinois, Indiana, Kentucky, Texas and Virginia.

When the 1977 Census of Manufactures was compiled, Illinois accounted for the largest share (28%) of the radio/TV receiving sets industry, while having less than 10% of the manufacturing establishments. California led in value of shipments of phonograph records and prerecorded tapes, controlling 27.4% of industry shipments, with about 42% of the total establishments in the U.S. industry.

Operating Ratios

Key business ratios by industry classification are compiled by the Business Economics Division of Dun & Bradstreet. Ratios for 1980 in the home entertainment segment of consumer electronics were reported as follows.

GENERAL INDUSTRY STATISTICS

Operating Ratios

Median Business Ratios, 1980 (Selected)

	Radio & TV Sets (SIC 3651)	Phono Records, Tape (SIC 3652)
Number of companies	113	82
Current assets to current debt (times)	2.25	1.86
Net profits on net sales (%)	4.59	7.53
Profits on net worth (%)	23.57	22.28
Sales to net worth (times)	5.28	3.85
Sales to inventory (times)	6.0	12.6

Source: Dun & Bradstreet, 1980 Key Business Ratios.

SHIPMENTS

The structure and product orientation of the home entertainment segment of consumer electronics has changed a great deal in the past two decades. Color television receivers have become the principal product, currently accounting for about 58% of the industry's shipments. U.S. plants with Far East ownership now supply an estimated 35% of U.S. industry color TV receivers.

The production of radios and audio tape recorders has shifted in large part to Japan and elsewhere in the Far East and significant production no longer exists in the U.S. New products, however, such as video disc players and systems, are being produced by U.S. manufacturers.

The value of U.S. factory shipments of radios and TV receiving sets and related products registered a real compound annual rate of growth of 5.0% in the period 1972-1981. Due to the recession, high interest rates and an increase in imports (particularly video cassette recorders and television receivers), shipments in 1982 (valued at a constant 1972 dollar) declined 8.6% from the 1981 level.

According to the U.S. Bureau of Industrial Economics (1982 U.S. Industrial Outlook), factory shipments in the radio/TV receiving set industry are expected to rise 3.3% in 1983 in terms of a constant 1972 dollar. The sale of color television receivers is expected to provide the impetus for this growth. A major domestic market for new receivers is resulting from the replacement of older sets with those incorporating modern technology and features such as solid state circuitry, electronic tuning, remote control and comb filters to improve picture resolution.

In addition, the increased variety of video program sources--cable, pay cable, subscription TV, multiple distribution services, video discs and video cassettes--and the alternative uses of the TV receiver for home computer and video game displays provide incentives for the ownership of more than one TV receiver per home.

SHIPMENTS

Factory shipments of automobile radios are expected to show a good increase in 1983 as automobile sales rise. The demand for supplementary higher powered high fidelity autosound equipment should continue at the 1982 level. The market for hi-fi audio equipment, loud speakers and accessory equipment is expected to continue at or slightly above 1982 levels.

Factory shipments by the home entertainment segment of the U.S. consumer electronics industry in constant dollars are expected to increase at a compound annual rate of 4.9% between 1983 and 1987, according to the U.S. Bureau of Industrial Economics. Continued growth is expected primarily because of the increasing development and use of new video and audio products, systems and services for home entertainment and for information.

According to findings in the 1981 annual survey of manufactures (released in April 1983 by the U.S. Bureau of the Census), the value of U.S. manufacturers' shipments of radio and TV sets and related equipment amounted to $5,634.5 million, showing a slight gain over the 1980 total. Shipments of records, record blanks and prerecorded tapes were up 4.5%, reaching $1,463.5 million in 1981.

Value of Shipments by All U.S. Producers of Specified Consumer Electronics, 1980, 1981

	Millions of $		% Change
	1981	1980	1981/1980
Radio & TV receiving sets	$5,634.5	$5,608.6	+ 0.5%
Radios: Home, portable & automotive	745.3	761.1	+ 2.1
Television receivers	3,499.2	3,332.6	+ 5.0
High Fidelity components	425.7	569.3	- 25.2
Speakers, inc. loudspeaker systems	800.2	804.0	- 0.5
Radio & TV receiving sets, n.s.k.	164.0	141.6	+ 15.8
Records, record blanks & prerecorded tapes	1,463.5	1,400.4	+ 4.5

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1980, 1981

In addition to information on value of shipments compiled in the annual surveys of manufactures, data in greater detail by product is compiled by the U.S. Bureau of the Census through sample surveys conducted among U.S. manufacturers of home-type radio receivers, television sets, phonographs, hi-fi components and speakers, results of which are published in the Current Industrial Reports series.

As noted previously, industry analysts look to color television receivers to provide the biggest area for growth in 1983. The number of receivers shipped is expected to rise from 10 million in 1982 to 10.5 million in 1983. The latest detailed figures, from the Current Industrial Series, for the year 1981 show total shipments of TV receivers of all types were valued at close to $3.4 billion, which was 2.5% above the 1980 total.

Quantity & Value of Shipments of Specified Consumer Electronics, 1981, 1980

(Quantity in thousands of units; Value in thousands of dollars)

	Quantity			Value		
	1981	1980	% Change 1981/80	1981	1980	% Change 1981/80
Home portable & automobile radios & radio-phonograph-tape recorder combinations, total	7,661.1	7,672.2	- 0.1%	$765,623	$707,979	+ 8.1%
Home radio receivers, exc. hi-fi receivers, radio phonograph combos., & TV receivers	120.8	205.5	- 41.2	6,537	10,798	- 39.5
Radio-phonograph-tape recorder combos.	834.1	1,050.0	- 20.6	118,922	151,529	- 21.5
Table & portable	647.6	802.2	- 19.3	84,001	106,701	- 21.3
Monaural Stereo & quadraphonic	647.6	802.2	- 19.3	84,001	106,701	- 21.3
Console model	186.5	247.8	- 24.7	34,921	44,828	- 22.1
Automobile radios	6,706.2	6,416.7	+ 4.5	640,164	545,652	+ 17.3
AM-FM	613.7	916.6	- 33.0	44,900	59,316	- 24.3
AM-FM with tape player	1,966.6	1,637.4	+ 20.1	327,456	253,377	+ 29.2
Household television receivers, including television combinations	10,358.7	10,319.7	+ 0.4	3,378,809	3,297,274	+ 2.5
Table & portable models	7,846.0	7,841.8	+ 0.1	2,166,358	2,107,854	+ 2.8
Monochrome over 10 in. through 17 in. Monochrome, over 17 in. Color 10 in. or less Color, over 10 in. through 17 in.	2,226.1	2,427.9	- 8.3	430,175	497,704	- 13.6
Color, over 17 in.	5,619.9	5,413.9	+ 3.8	1,736,183	1,610,150	+ 7.8
Console & consolette models	2,471.9	2,434.2	+ 1.5	1,191,144	1,166,576	+ 2.1
TV, radio, phonograph & tape recorder combination models	40.7	43.7	- 6.9	20,307	22,844	- 11.1
Recorders, phonographs, hi-fi components & radio & television chassis	19,196.2	20,624.2	- 6.9	543,641	513,908	+ 5.8
Phonographs						
Portable, table & console	1,184.0	1,425.1	- 16.9	39,724	48,469	- 18.0
Stereo compact systems	898.7	1,029.7	- 12.7	100,675	106,765	- 5.7
Consumer hi-fi components	15,729.2	16,991.2	- 7.4	208,557	220,937	- 5.6
Stereophonic receivers	276.1	281.6	- 2.0	49,570	51,920	- 4.5
Tuners (AM-FM & FM)	12.8	18.5	- 30.8	2,604	3,620	- 28.1
Preamplifier control units	25.2	33.2	- 24.1	11,148	13,424	- 17.0
Power amplifiers	96.6	84.0	+ 15.0	33,244	31,360	+ 6.0
Monophonic	13.5	10.2	+ 32.4	3,439	3,021	+ 13.8
Stereophonic	83.1	72.8	+ 14.1	29,805	28,339	+ 5.2
Turntables (record players)	385.9	296.0	+ 30.4	25,000	19,363	+ 29.1
Phonograph arms (sold separately)	140.8	416.5	- 66.2	1,243	1,898	- 34.5
Phonograph cartridges & pickups	3,311.3	4,509.4	- 26.6	35,194	43,412	- 18.9
Phonograph needles & styli	10,325.1	10,180.8	+ 1.4	30,290	32,669	- 7.3

(continued)

Quantity & Value of Shipments of Specified Consumer Electronics, 1981, 1980
(Quantity in thousands of units; Value in thousands of dollars)
(continued)

	Quantity			Value		
	1981	1980	% Change 1981/80	1981	1980	% Change 1981/80
Consumer audio/video recorders, exc. radio-phonograph-TV-recorder combos., office recording machines, & recorder mechanisms, incl. all other home-type electronic equip. sold separately	1,294.3	1,053.2	+ 22.9%	$176,334	$ 95,401	+ 84.8%
Audio tape recorders & players	90.8	174.6	- 48.0	13,963	25,102	- 44.4
Video recorders & players, complete	nr	nr	--	nr	nr	--
Other home-type electronic equip.	919.5	776.4	+ 18.4	96,680	47,237	+104.6
Speaker systems, microphones, home-type electronic kits & commercial sound equip., incl. public address systems	48,753.0	44,800.1	+ 8.8	816,552	792,773	+ 3.0
Loudspeaker systems, one or more speakers in a single enclosure	4,446.6	4,667.3	- 4.7	305,405	368,589	- 17.1
Floor standing	2,007.9	1,931.1	+ 4.0	160,621	179,202	- 10.4
Bookshelf	2,113.2	2,269.6	- 6.9	120,873	141,575	- 14.6
Other loudspeaker systems	325.5	466.5	- 30.2	23,911	47,812	- 50.0
Loudspeakers sold separately, incl. radio, television & auto. radio speakers	40,591.8	36,622.6	+ 10.8	324,619	270,416	+ 20.0
Microphones	2,122.2	2,235.3	- 5.1	49,550	46,931	+ 5.6
Home entertainment equipment kits, incl. amplifiers, audio preamplifiers, audio tuners & other, n.e.c.	694.1	493.1	+ 40.7	39,422	23,129	+ 70.4
Music distribution systems (FM multi-plex subscriber service)						
Public address systems	898.2	781.7	+ 14.9	97,556	83,708	+ 16.5

n.e.c. = not elsewhere classified. nr = not reported.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Radio and Television Receivers, Phonographs and Related Equipment MA-36M(80)-1.

Manufacturers' shipments of recording products (both records and tapes), fell off slightly overall in 1982 according to the Recording Industry Association of America. The gains recorded by shipments of cassette type tape, 44.5% on a dollar basis, were not enough to offset the decline registered by all other segments of the industry.

Overall, shipments of records and tapes in 1982 were valued at $3.6 million at the manufacturers level.

SHIPMENTS

Shipments of Phonograph Records & Prerecorded Tapes, 1981, 1982
(Quantity in Millions of Units; Value in Thousands of Dollars)

	Quantity			Value		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Total, all reported categories	575.6	594.0	- 3.1%	$3,592.0	$3,626.0	- 0.9%
Discs, total	378.7	420.0	- 9.8	2,177.0	2,359.0	- 7.7
Singles	137.2	147.0	- 6.7	283.0	246.0	+15.1
Disc albums	241.5	273.0	- 11.5	1,894.0	2,113.0	-10.4
Tapes, total	196.9	174.0	+ 13.2	1,415.0	1,267.0	-11.7
8-track	13.7	50.0	- 72.6	36.0	313.0	-88.5
Cassettes	183.2	124.0	+ 47.7	1,379.0	954.0	+44.5

Source: Recording Industry Association of America

According to the Electronics Industry Association (HFD - Retailing Home Furnishings, 6/13/83) the fastest growing category of home entertainment equipment over the first 21 weeks of 1983, was the home video cassette recorder group, whose shipments to dealers more than doubled during the period to 1.2 million units from the same period in 1982. The only measured category to register a decline in its shipments to dealers over the same period was the monochrome TV group where shipments were off 7.8%.

Video cameras registered the greatest amount of growth for the full year 1982 vs. 1981 according to the EIA. This group garnered an increase of 56% in unit shipments while the second largest increase was for video cassette recorders, up 49.5%.

Manufacturers' Sales to Dealers of Selected Home Entertainment Equipment*
(Thousands of Units)

	Jan. 2, 1983 - May 27, 1983			Annual totals		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Television, total	6,762.4	6,318.4	+ 7.0%	17,131.5	16,698.2	+ 2.6%
Monochrome	1,983.6	2,151.0	- 7.8	5,765.2	5,540.9	+ 4.0
Color	4,778.8	4,167.4	+ 14.7	11,366.3	11,157.3	+ 1.9
Home video cassette recorders	1,230.0	600.2	+104.9	2,034.8	1,361.0	+49.5
Video cameras	122.9	104.8	+ 17.3	295.9	189.8	+56.0
Projection TV	47.7	31.1	+ 53.4	117.3	121.7	- 3.6

* These figures from the marketing services department of the Electronic Industries Association reflect total market statistics for products in the United States regardless of country of origin.

Source: HFD - Retailing Home Furnishings

SHIPMENTS

The following table shows the 1982 distribution of shipments by month of specified types of Home Entertainment equipment as reported by the Electronics Industry Association in HFD - Retailing Home Furnishings.

Manufacturers Shipments of Selected Consumer Electronics by Month, 1982

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Televisions, total	100.0%	6.9	7.4	8.9	7.0	6.7	9.1	7.2	7.2	10.6	9.4	9.0	10.7
Color	100.0%	7.1	7.2	8.9	7.1	6.3	9.3	7.3	7.1	10.8	9.5	9.3	10.2
Monochrome	100.0%	6.7	7.9	8.8	6.6	7.4	8.7	7.0	7.3	10.1	9.1	8.5	11.8
VCR's	100.0%	5.4	6.0	6.9	5.7	5.4	5.4	7.0	6.7	11.9	11.8	11.4	16.3
Video cameras	100.0%	6.3	6.4	7.5	6.5	8.8	8.1	8.8	6.3	9.1	9.7	8.0	14.6
Projection TV	100.0%	6.1	5.5	5.4	5.3	5.3	4.3	6.6	8.4	13.6	14.0	12.4	13.3

Source: HFD-Retailing Home Furnishings,
(Raw data: Electronics Industry Association)

Video Disc Players

According to Frost & Sullivan, a private market research firm, shipments of video disc players are expected to jump to 600,000 units in 1983, three times the level recorded in 1981. In terms of dollar value of shipments, video disc player shipments are expected to reach $405 million by 1983 while shipments of video discs are estimated to be at $130 million in that same year.

Video Disc Player Shipments, 1981 - 1983

	Quantity (Thous. of units)			Quantity % Change	Value (Millions of $)			Value % Change
	1983(p)	1982	1981	1983/81	1983(p)	1982	1981	1983/81
Video disc players	600	350	200	+200.0%	$405	$235	$157	+158.0%
Video discs	na	na	na	na	130	70	36	+261.1

na = not available
(p) = projected

Source: Frost & Sullivan,
Home Entertainment & Information Market, No. 843

The following data on apparent consumption for 1981 was compiled by the U.S. Bureau of the Census in the 1981 Current Industrial Reports Series. This represents domestic manufacturers' shipments minus exports plus imports, and most accurately indicates the supply of the covered types of consumer electronics in the U.S. in that year.

APPARENT CONSUMPTION

Apparent Consumption of Specified Consumer Electronics, 1980, 1981

	1981	1980	% Change 1981/1980	Imports % of Apparent Consumption 1981
	Quantity (Thousands of Units)			
Television receivers				
Monochrome	17,672.2	5,959.5	+ 5.1%	47%
Color		10,860.0		
Loudspeakers	123,329.2	111,433.4	+ 10.7	67
Microphones	5,993.0	6,701.4	- 10.6	93
Automotive radio receivers, tape players/recorders	20,296.8	18,663.0	+ 8.8	71
Radio receivers	33,376.9	29,787.2	+ 12.1	na
Radio-phonograph-tape combinations	16,435.4	na	na	96
Phonograph, record players, cartridges & styli	22,554.9	na	na	27
	Value (Millions of $)			
Television receivers				
Monochrome	$ 4,144.3	$ 410.0	+ 8.5%	24%
Color		3,408.8		
Loudspeakers	835.6	788.6	+ 6.0	36
Microphones	56.6	48.9	+ 15.7	48
Automotive radio receivers, tape players/recorders	1,324.8	1,092.7	+ 21.2	56
Radio receivers	665.2	601.3	+ 10.6	93
Radio-phonograph-tape combinations	1,077.9	826.5	+ 30.4	91
Phonograph, record players, cartridges & styli	448.8	459.6	- 2.3	54

na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Radio & Television Receivers, Phonographs
& Related Equipment, MA-36M(81)-1.

PRODUCER PRICES

Although producer (factory) prices of all items performed extremely well in 1982, showing a rise of only 2% from the previous year, home electronic equipment did even better by registering a decline of 1.2% during this same period. The largest decline was registered by the home radio group (-5.6%).

By April 1983, producer prices of consumer electronics were down 1.1% from April 1982 with the largest decline in the twelve month period coming in the 10" - 17" color TV group (-7.6%)

Producer Price Indexes for Consumer Electronics--1981, 1982, April 1982, 1983
(6/80 = 100, unless otherwise noted)

	April Averages			Annual Averages		
	1983	1982	1983/82	1982	1981	1982/81
All items (1967 = 100)	300.8	298.0	+ 0.9%	299.3	293.4	+ 2.0%
Home electronic equipment (1967 = 100)	86.9	87.9	- 1.1	88.1	89.2	- 1.2
Radio receivers (1967 = 100)	90.3	90.9	- 0.7	91.0	92.3	- 1.4
Home radios	91.6	93.1	- 1.6	92.3	97.8	- 5.6
Radio combos., portable & table	na	na	na	82.5	95.4	-13.5
Car radios	84.4	84.3	+ 0.1	84.3	82.9	+ 1.7
Television receivers (1967 = 100)	84.1	85.8	- 2.0	86.1	88.3	- 2.5
B & W TV, table or portable	91.1	88.6	+ 2.8	89.0	87.6	+ 1.6
Color TV receivers	94.0	95.3	- 1.4	95.5	98.3	- 2.8
Color console TV receivers (1967 = 100)	81.3	81.5	- 0.2	82.4	84.1	- 2.0
Color TV, over 10" - 17"	83.9	90.8	- 7.6	90.5	93.9	- 3.6
Color TV, over 17"	93.7	95.1	- 1.5	93.9	97.5	- 3.7
Other home electronic equip.	98.3	96.8	+ 1.5	96.9	92.9	+ 4.3
Phonographs	112.5	107.7	+ 4.5	107.4	101.2	+ 6.1
Tape recorders & players	110.3	110.3	--	109.7	102.7	+ 6.8
Audio tape recorders	82.2	82.2	--	81.8	77.3	+ 5.8
Speakers (incl. systems)	111.2	110.4	+ 0.7	110.6	107.4	+ 3.0
Bookshelf speakers	99.9	104.4	- 4.3	104.3	104.9	- 0.6
Floor standing speakers	122.1	116.8	+ 4.5	118.8	113.3	+ 4.8
Speakers sold separately	110.5	110.2	+ 0.3	110.3	105.5	+ 4.5

Source: Bureau of Labor Statistics

FOREIGN TRADE

Imports

According to the Bureau of Industrial Economics, 1983 Industrial Outlook, imports of consumer electronics have grown at a compound annual rate of 12.9% in current dollars over the last 10 years. This same source indicates that nearly 85% of all consumer electronics imports to the U.S. come from far eastern countries.

A significant amount of consumer electronics imports enter the U.S. in an unassembled format. These products are then assembled in plants either in the U.S. or Mexico and are then sold. The U.S. Department of Commerce puts imports of this kind from Mexico at $350 million in 1982. This figure is expected by many analysts to grow significantly as the lower labor costs make this much more profitable for foreign producers.

FOREIGN TRADE

Imports

The U.S. Department of Commerce reports that in 1982 imports of reported categories of consumer electronics fell 4.7% in 1982 to $6.8 billion. The largest category, miscellaneous home entertainment equipment, was responsible for over one-third of these imports in that year. Only two categories of electronic equipment reported gains in imports in 1982 over 1981, the telephone equipment group and the audio/video cassette recorder group, up 13.3% and 17.3% respectively.

Industry analysts expect imports to jump dramatically in 1983 as the U.S. economy recovers and consumers begin to make long delayed purchases of personal electronic equipment. The U.S. Bureau of Industrial Economics estimates that imports of consumer electronics will rise to about $7.7 billion in 1983 with imports of color televisions accounting for approximately $620 million of the imports.

U.S. Imports of Specified Consumer Electronics Products, 1981, 1982

	Quantity (Thous. of Units)		% Change	Value C.I.F.* (Mil. of $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Reported total	na	na	na	$6,863.3	$7,199.7	- 4.7%
Reported total, specified products	--	--	--	6,588.4	6,875.2	- 4.2
Television receivers, total	6,829.9	na	na	1,462.3	1,565.0	- 6.6
Unassembled & incomplete subassemblies	34.8	na	na	666.1	735.2	- 9.4
Monochrome, fully assembled	4,762.1	5,465.6	- 12.9%	289.3	348.3	- 16.9
Color, fully assembled	2,033.1	1,877.2	+ 8.3	506.9	481.5	+ 5.3
Radios & radio combinations, total	60,060.6	61,534.8	- 2.4	1,997.7	2,124.7	- 6.0
Radio-TV-phonograph combos.	0.2	--	na	--	--	--
AM/AM-FM automobile radios	3,643.7	3,580.5	+ 1.8	171.8	147.7	+ 16.3
AM/AM-FM radios with clocks or timers	8,375.2	9,939.8	- 15.7	118.7	115.4	+ 2.9
AM/AM-FM radios without clocks or timers	2,798.9	3,145.2	- 11.0	195.7	240.3	- 18.6
AM/AM-FM radios, nspf	22,362.0	20,941.0	+ 6.8	249.4	221.7	+ 12.5
Radio-tape recorder combos.	10,587.6	11,487.4	- 7.8	562.4	632.8	- 11.1
Radio-tape player combinations	10,448.0	10,452.0	--	541.9	585.8	- 7.5
Radio-phonograph-tape recorder combinations	1,498.2	1,729.3	- 13.4	128.8	167.5	- 23.1
Radio-phonograph-tape player combinations	302.4	199.5	+ 51.6	27.5	11.5	+139.1
Radio-phonograph combinations	44.3	60.1	- 26.3	1.5	2.0	- 25.0
Miscellaneous home entertainment equipment, total	na	na	na	2,382.5	2,531.7	- 5.9
Record players, phonographs, record changers & turntables	3,780.1	6,161.3	- 38.6	152.0	215.5	- 29.5

(continued)

BEST AVAILABLE COPY

FOREIGN TRADE

Imports

U.S. Imports of Specified Consumer Electronics Products, 1981, 1982
(continued)

	Quantity (Thous. of Units) 1982	Quantity (Thous. of Units) 1981	% Change 1982/1981	Value C.I.F.* (Mil. of $) 1982	Value C.I.F.* (Mil. of $) 1981	% Change 1982/1981
Video tape players	75.8	116.4	- 34.9	$ 35.1	$ 50.5	- 30.5%
Video tape recorders, total	2,494.3	2,020.6	+ 23.4	1,072.6	1,034.4	+ 3.7
Color	2,491.6	2,010.2	+ 23.9	1,069.6	1,027.8	+ 4.1
All others	2.7	10.4	- 74.0	3.0	6.6	- 54.5
Audio tape players	6,353.1	4,668.9	+ 36.1	192.4	168.0	+ 14.5
Tape recorders, exc. office type	9,927.9	11,339.7	- 12.5	456.1	529.2	- 13.8
Tape recorder & tape player combos., exc. radio & TV receivers	na	na	na	74.4	41.8	+ 78.0
Loud speakers	69,536.4	83,744.3	- 17.0	248.1	285.9	- 13.2
Audio frequency elec. amplifiers	5,615.6	4,933.1	+ 13.8	151.8	156.1	- 2.8
Headphones, earphones & combos. of electric sound amplifier sets	na	na	na	46.6	50.3	- 7.4
Audio/video cassettes & records, total	na	na	na	390.0	332.6	+ 17.3
Magnetic audio recording cassettes, not recorded	221,950.9	187,935.3	+ 18.1	107.1	98.8	+ 8.4
Magnetic audio recording cartridges, not recorded	757.9	1,765.7	- 57.1	0.8	1.4	- 42.9
Magnetic audio recording media, exc. cassettes & cartridges, nspf, not recorded	na	na	na	35.8	32.0	+ 11.9
Magnetic video recording cassettes, not recorded	19,198.0	17,670.5	+ 8.6	132.8	120.2	+ 10.5
Magnetic video recording cartridges, not recorded	40.4	33.3	+ 21.3	0.4	0.2	+100.0
Magnetic video recording media, exc. cassettes & cartridges, nspf, not recorded	na	na	na	58.9	27.8	+111.9
Phonograph records, stereophonic or quadraphonic, 33 1/3 rpm	19,716.1	16,000.3	+ 23.2	45.7	38.5	+ 18.7
Phonograph records, nspf	4,400.0	7,279.2	- 39.6	8.5	13.7	- 38.0
Home protection, total	6,323.6	6,618.5	- 4.5	48.1	49.5	- 2.8
Smoke detectors	3,683.5	4,290.5	- 14.1	24.4	28.9	- 15.4
Burglar & fire alarms	2,640.1	2,328.0	+ 13.4	23.7	20.6	+ 15.1

(continued)

Imports

U.S. Imports of Specified Consumer Electronics Products, 1981, 1982 (continued)

	Quantity (Thous. of Units)		% Change	Value C.I.F.* (Mil. of $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Telephone equipment, total	na	na	na	$307.8	$271.7	+ 13.3%
Telephone instruments	5,471.1	2,715.2	+101.5%	142.8	138.0	+ 3.5
Telephone apparatus & parts thereof, nspf	na	na	na	165.0	133.7	+ 23.4

na = not available
nspf = not specially provided for

* The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135, December 1981, 1982

Exports

The Bureau of Industrial Economics reports that in the period 1972 - 1981, U.S. exports of consumer electronics have grown at a compound annual rate of 18.3%. However, in 1982, they declined 22% from the previous years level primarily due to the worldwide recession and price competition and product innovation from Far East manufacturers.

The largest drop in exports between 1981 and 1982 was registered by the television receiver segment of the personal electronics industry. The value of TV sets exported by the United States fell by nearly half in 1982 to $220 million. Despite the huge decline in the value of its exports on a unit basis, TVs remained the largest category of exports reported on. Only two categories of electronic equipment registered gains in 1982 vs. 1981, home protection equipment and magnetic recording media, up 7.5% and 3.0% respectively.

Analysts site competition from the Far East when predicting that exports of consumer electronic products will be held at 9.8% in 1983. However, expanding technology is expected to boost exports significantly over the next several years as other consuming countries slowly climb out of the recession which has gripped the world economy since 1981.

FOREIGN TRADE

Exports

U.S. Exports of Specified Consumer Electronics Products, 1981, 1982

	Quantity (Thous. of Units) 1982	Quantity (Thous. of Units) 1981	% Change 1982/1981	Value F.A.S.* (Mil. of $) 1982	Value F.A.S.* (Mil. of $) 1981	% Change 1982/1981
Reported total, specified products	--	--	--	$ 1,029.9	$1,335.2	- 22.9%
Television receivers, total	2,361.3	4,186.8	- 43.6%	220.5	389.8	- 43.4
Unfinished or unassembled	1,841.2	3,280.5	- 43.9	64.6	123.8	- 47.8
Monochrome, fully assembled	137.9	260.4	- 47.0	16.6	29.7	- 44.1
Color, fully assembled	382.2	646.4	- 40.9	139.3	236.3	- 41.0
Radios & radio combinations, total	1,261.5	1,439.1	- 12.3	108.4	121.6	- 10.9
Radio-TV-phonograph combos.	8.2	9.5	- 13.7	3.5	4.4	- 20.5
AM/AM-FM automobile radios	758.5	774.7	- 2.1	71.6	72.6	- 1.4
AM/AM-FM radios, except automobile	412.7	559.6	- 26.3	11.7	19.0	- 38.4
Radio-phono-tape recorder combos., exc. with TV	82.1	95.3	- 13.9	21.6	25.6	- 15.6
Miscellaneous home entertainment equipment, total	na	na	na	236.4	276.3	- 14.4
Record players, phonographs, record changers & turntables	64.0	99.2	- 35.5	16.9	26.4	- 36.0
Video tape players	1.8	3.5	- 48.6	7.1	5.8	+ 22.4
Video tape recorders, total	19.7	13.2	+ 49.2	77.5	85.2	- 9.0
Color	14.1	9.5	+ 48.4	66.8	76.1	- 12.2
All others	5.6	3.7	+ 51.4	10.7	9.1	+ 17.6
Audio tape players	109.1	149.8	- 27.2	18.2	18.4	- 1.1
Headphones, earphones & combos. of sound amplifiers sets	na	na	na	23.8	26.0	- 8.5
Loudspeakers	4,269.9	4,923.0	- 13.3	191.9	114.5	+ 67.6
Audio/video cassettes & records, total	na	na	na	444.7	431.8	+ 3.0
Magnetic audio tape, not recorded	70,711.4	157,785.1	- 55.2	62.5	87.4	- 28.5
Magnetic viedo tape, not recorded	6,842.7	2,654.5	+157.8	246.0	163.7	+ 50.3
Magnetic recording media, nspf	--	--	na	51.3	64.0	- 19.8
Magnetic video tape recordings	32,939.3	31,423.6	+ 4.8	26.7	28.9	- 7.6
Phonograph records, stereo, or quadrophonic, 33 1/3 rpm	10,780.7	17,093.6	- 36.9	32.3	50.9	- 36.5
Phonograph records, nspf	8,426.7	11,876.6	- 29.0	25.9	36.9	- 29.8

(continued)

FOREIGN TRADE

Exports

U.S. Exports of Selected Consumer Electronics Products, 1981, 1982
(continued)

	Quantity (Thous. of Units) 1982	Quantity (Thous. of Units) 1981	% Change 1982/1981	Value F.A.S.* (Mil. $) 1982	Value F.A.S.* (Mil. $) 1981	% Change 1981/1981
Home protection, total	na	na	na	$95.6	$88.9	+ 7.5%
Burglar alarms	160.7	186.7	- 13.9%	32.8	31.6	+ 3.8
Smoke detectors	572.9	693.7	- 17.4	14.2	15.3	- 7.2
Fire alarms, exc. smoke detectors	--	--	na	48.6	42.0	+ 15.7
Telephone instruments	305.6	406.0	- 24.7	24.3	26.8	- 9.3

nspf = not specially provided for.
na = not available

*F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1981 and 1982.

THE SIZE OF THE POTENTIAL MARKET

The Female Population of the U.S., 1983 & Projections to 2000*

	Number (Thous.) 1983	Number (Thous.) 1990	Number (Thous.) 2000	% Change 2000/1983	Percent Distribution 1983	Percent Distribution 1990	Percent Distribution 2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 16 years	26,923	28,240	29,175	+ 8.4	22.4	22.0	21.2
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16 - 19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20 - 34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35 - 54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.2	34.3	37.7	+ 17.1			

(continued)

THE SIZE OF THE POTENTIAL MARKET

The Male Population of the U.S., 1983 & Projections to 2000*

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4%	100.0%	100.0%	100.0%
Under 16 years	28,180	29,591	30,592	+ 8.6	24.7	24.4	23.5
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16 - 19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20 - 34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35 - 54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

Total Population of the U.S., 1983 & Projections to 2000*

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
TOTAL, MALE & FEMALE							
Total, all ages	234,193	249,731	267,990	+ 14.4%	100.0%	100.0%	100.0%
Under 16 years	55,103	57,830	59,768	+ 8.5	23.5	23.2	22.3
16 years & over	179,090	191,901	208,222	+ 16.3	76.5	76.8	77.7
16 - 19	15,612	13,703	15,083	- 3.4	6.7	5.5	5.6
20 - 34	62,087	62,073	53,513	- 13.8	26.5	24.8	20.0
35 - 54	51,759	63,236	80,812	+ 56.1	22.1	25.3	30.2
55 & over	49,632	52,889	58,814	+ 18.5	21.2	21.2	21.9
Median age (years)	30.9	33.0	36.3	+ 17.5			

*Middle series (out of 3) projections based on varying assumptions on fertility, mortality and emigration.

Source: U.S. Bureau of the Census,
Series P-25, No. 922
(October 1982)

While some consumer electronics products, such as TVs and radios, have already reached saturation levels in U.S. households and depend mainly on replacement sales for growth, many other products have barely entered the home market. For example, only an estimated 5% of households own either a video cassette recorder or a telephone. According to an EIA survey, 31% of U.S. households own component stereo systems. Thus, there is room for significant growth for these products among the more than 84 million households in the U.S. currently.

Of the 83.5 million households in the U.S. in 1981, almost a quarter (23.1%) were headed by someone between the ages of 25 and 34 and 18.3% had a household head aged 35-44 years old. In 1981, 27.6% of all households contained at least four persons.

THE SIZE OF THE POTENTIAL MARKET

Number & Median Income of U.S. Households
By Age of Householder & Size of Household, 1981, 1981

	Number of Households (Thous. Units)		% Change	Median Income		% Change
	1981	1980	1981/1980	1981	1980	1981/1980
Total	83,527	82,368	+ 1.4%	$19,074	$17,710	+ 7.7%
Age of Householder						
15-24 years	6,110	6,443	- 5.2	13,242	12,711	+ 4.2
25-34 years	19,327	19,153	+ 0.9	20,513	19,337	+ 6.1
35-44 years	15,326	14,462	+ 6.0	25,384	23,627	+ 7.4
45-54 years	12,505	12,694	- 1.5	27,044	25,121	+ 7.7
55-64 years	12,947	12,704	+ 1.9	21,041	19,547	+ 7.6
65 years & older	17,312	16,912	+ 2.4	9,903	8,781	+ 12.8
Size of Household						
1 person	19,354	18,936	+ 2.2	9,192	8,162	+ 12.6
2 person	26,486	25,787	+ 2.7	18,909	17,506	+ 8.0
3 person	14,617	14,569	+ 0.3	23,601	21,737	+ 8.6
4 person	12,868	12,768	+ 0.8	26,324	24,410	+ 7.8
5 person	6,103	6,117	- 0.2	26,131	24,857	+ 5.1
6 person	2,480	2,549	- 2.7	26,945	24,415	+ 10.4
7 or more persons	1,619	1,643	- 1.5	24,558	23,332	+ 5.3

Source: U.S. Bureau of the Census,
Current Population Reports,
Money Income of Households, Families & Persons in the U.S.: 1981, March 1983

RETAIL SALES BY PRODUCT

The consumer electronics market encompasses a great variety of products, including computers and calculators, home entertainment systems, home security systems and products, communications products and more. In total, industry analysts place the value at retail of this market at about $17 billion in 1982.

Retail sales figures on specific products that make up this fast-growing market are not available in government sources, but must be gleaned from a variety of trade sources.

The trade publication Discount Merchandiser reports the following breakdown on retail sales of consumer electronics, reported by this source at about $13.5 billion in 1981.

Distribution of Retail Sales of Consumer Electronics, 1981
By Type of Outlet

Type of Store	1981 Volume (Thous. $)	% of Sales in Own Stores	% to Total
TV, radio stores	6,575,000	85.7%	48.8%
Household appliance stores	1,260,000	18.9	9.4
Discount stores	1,242,000	2.6	9.2
Department stores	1,062,000	2.4	7.9
Misc. general merchandise stores	826,000	6.1	6.1
Catalog showrooms	721,000	9.4	5.4
Furniture stores	672,000	3.6	5.0
Auto & home supply stores	511,000	2.6	3.8
Drug stores	266,000	0.8	2.0
Mail order	186,000	3.7	1.4
Home centers	153,000	1.9	1.0
Total	$13,474,000		100.0%

Source: Discount Merchandise (May 1982)

Television Receivers

After a decade-long struggle in a seemingly mature marketplace, where 98% of all households owned at least one television set, sales of TVs, especially color sets, have shown marked increases since 1980. In 1982, there were a total of 17.1 million sets sold in the U.S. with 11.4 million of these being color with the remainder coming from the black & white category. Over the first 21 weeks of 1983, television sales were up another 7.0% from their comparable 1982 figures on a unit basis.

Analysts see this recent growth coming from two primary sources. The first major cause for the increased growth rate is due to the recession prevailing since 1980. Consumers have become more conservative with their disposable income and have turned to their own homes as their main source of entertainment. At the same time, advances in technology have made it more economically feasible to bring a vast variety of entertainment and information sources into the home. Consequently, consumers are upgrading their televisions, the centerpiece of the technology, so as to more easily accommodate this increase.

Projection TV, a relatively new entrant in the field, has faired well, registering sales of 117,000 units in 1982.

Analysts believe that this climb in the television industry will continue in the future. Some industry insiders see sales of color televisions reaching 12 to 14 million units by 1983, with a more optimistic group pointing to the possibility of 15 million units in sales by that year.

RETAIL SALES BY PRODUCT

Television Receivers

Although recent surveys indicate that specialty stores control approximately one-third of the television market (relatively the same percentage as the 1977 Census of Retail Trade indicates) there has been a major shift in sales within this group due to the highly competitive nature of the television industry. Consumers are tending to buy less in traditional TV/appliance stores and are now purchasing more in specialized audio/video stores. Overall, department stores have held steady in their share of the market, consistently representing about 20% (this includes discount department store operations.)

Video Cassette Recorders

Since their introduction in 1975, the home video cassette recorder has enjoyed ready acceptance, with sales growth coming in every year. Presently, with only 5% of all U.S. households owning VCRs, industry analysts see potential growth for the $5 billion category for many years to come.

Portable VCRs are becoming extremely popular with the home-movie making market, skyrocketing this new category to nearly 40% of industry sales according to some industry analysts.

Video Disc Systems

After a much ballyhooed introduction in 1980, video disc systems are turning out to be more difficult to sell than marketers had predicted. Sources estimate that only about 350,000 video disc players and possibly 4 million video discs were sold in 1982.

Manufacturers now believe that it will take until at least 1985 for video disc systems to be readily accepted by consumers. With three mutually-incompatable systems now on the market, retailers must first overcome the great deal of confusion which presently exists within consumers' minds as to which system to purchase.

Home Protection

After undergoing a rapid period of growth in the late 1970's, the home protection industry has more recently experienced a major shake-out, where only several of the most profitable companies have remained in the industry.

It is estimated that in 1981, consumers spent more than $230 million on home security systems with nearly half of this total coming in sales of smoke detectors.

Sales of Home Security Devices, 1979-1981
(Thousands of Dollars)

	1981	1980	1979	1981/1980	1981/1979
Home security, total	$235,339	$205,242	$209,230	+ 14.7%	+ 12.5%
Smoke detectors	116,272	94,050	94,200	+ 23.6	+ 23.4
Fire extinguishers	32,970	32,900	35,000	+ 0.2	- 5.8
Intrusion systems	38,367	35,028	42,750	+ 9.5	- 10.3
Smoke/fire/intrusion systems	47,730	43,264	37,280	+ 10.3	+ 28.0

Source: Merchandising Magazine

RETAIL SALES BY PRODUCT

Telephones

At the present time 96% of all households have at least one phone representing a total of about 142 million phones.

Although owning your own telephone has been legal for years and has received heavy publicity recently, a meagre 5% of all U.S. households have exercised their option to purchase. Industry analysts report that despite the obvious savings of buying over leasing, consumers are deterred by the prospects of having to care for future repairs, as well as the thought of owning a phone without all the latest features.

The sales of home telephones reached a total of $600 million in 1982. The outlook for growth is bright. According to General Electric Co., a new entrant in the home phone market, sales will climb to over 20 million units by 1987, from the 5 million recorded in 1982.

Component Audio

The Electronics Industry Association reports that in the period 1972-1981 shipments of audio components (receivers, turntables, loudspeakers, etc.) have grown at an annual rate of 10%-20%. In 1982, analysts estimate that total retail sales of the category were somewhere in the area of $2 billion.

At the present time, retailers of stereos are undergoing a major shake-out with most survivors reporting that they are diversifying into sales of home entertainment equipment rather than relying on traditional audio for their livelihood.

It is widely believed that the audio business at the present time is highly characterized by replacement sales. A majority of sales of audio equipment, particularly component audio, are to audiophiles who are attempting to bring their present systems up to "state of the art" status.

RETAIL SALES BY STORE TYPE

Radio & Television Stores

Radio and TV stores were largely small operations in 1980, where over 80% of establishments had fewer than 10 paid employees. Operations with more than 50 workers were the rarity in 1980 according to the U.S. Census Bureau which reported that only 0.4% of all establishments fit into this category. Nearly 6 out of 10 workers in radio and TV stores work in outlets with less than 10 employees while 5.5% worked in outlets with more than 50 employees.

Radio & Television Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of total	Number	% of total	Mil. $	% of total
Radio & TV stores, total	14,349	100.0%	87,507	100.0%	$912.0	100.0%
By employment size:						
Less than 4 employees	7,745	54.0	19,693	22.5	201.5	22.1
5 to 9 employees	4,475	31.2	31,590	36.1	308.2	33.8
10 to 19 employees	1,768	12.3	22,493	25.7	238.0	26.1
20 to 49 employees	304	2.2	8,901	10.2	107.0	11.7
50 or more employees	57	0.4	4,830	5.5	57.3	6.3

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

RETAIL SALES BY STORE TYPE

Radio & Television Stores

Sales in radio and TV stores climbed only slightly between 1981 and 1982 rising only 1.6% to a total of $8.5 billion in that year.

Number of Stores & Sales of Radio & TV Stores, 1979 - 1982

	1982	1981	1980	1979	Percent Change 1982/1981	Percent Change 1982/1979
Total sales (mil. $)	$8,451	$8,317	$ 7,326	$ 6,604	+ 1.6%	+ 28.0%
No. of stores	na	na	14,349	14,999	na	na

Source: U.S. Bureau of the Census,
Revised Monthly Retail Sales BR-13-82S,
County Business Patterns, 1979, 1980

Department Stores

According to the National Retail Merchants Association, the typical department store reporting sales of radio and audio equipment and supplies indicated that sales gained 10.8% in 1981 compared with 1980. Sales of television sets rose an even larger 14.1% during the same period.

Merchandising & Operating Results in Department Stores
With Total Annual Sales Over $1 Million

	Radio & Audio Equipment & Supplies	Television Receivers
Net sales, % change from last year	+ 10.8%	+ 14.1%
Sales, % of merchandise division	14.5	34.2
Sales, % to total store sales	0.8	1.8
$ sales per square foot of selling space	$ 123.4	$ 173.2
Cumulative markon, %	31.8	23.8
Gross margin, % of sales including cash discounts	25.7	17.4
Markdowns, retail, % of sales	8.1	6.8
Returns, % of sales	11.7	10.2
Number of stock turns	2.7	3.7
Salespeople's salaries, % of sales	9.8	8.5
Sales promotions, % of sales	4.2	3.3

Source: National Retail Merchants Association
"Merchandising & Operating Results,"
1982 Edition.

RETAIL ADVERTISING

Christmas is the main time of the year in which consumers make purchases of electronics items. November and December combined account for about one third of the years' sales.

Monthly Distribution of Newspaper Ad Linage, 1981

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Radio sets	100.0%	2.8%	4.8%	6.0%	6.1%	11.0%	8.3%	5.9%	6.8%	6.0%	7.3%	14.2%	20.8%
Stereo sets	100.0	5.0	7.2	7.3	6.1	8.2	7.5	6.4	8.2	8.0	9.1	12.4	14.6
Television	100.0	7.3	8.0	7.6	7.3	8.1	6.9	6.9	8.6	8.3	8.9	10.8	11.3

Source: Newspaper Advertising Bureau,
1983 Newspaper Advertising Planbook.

CONSUMER PRICE TRENDS

Throughout the years, the consumer electronics industry has been able to produce better quality and more sophisticated products without price increases due to a rapidly advancing technology.

Another factor which tends to keep consumer electronics prices relatively low is the tendency of the industry to seek out the lowest labor rate countries for its manufacturing needs because of the extremely competitive nature of the market. Thus, the industry's production has moved during the last twenty years from the U.S. to such low cost areas as Taiwan, Hong Kong and Mexico.

The CPI for television and sound equipment (tape recorders and radios) was stable between 1981 and 1982 at 108.5. Meanwhile the index for televisions alone actually registered a decrease during the period, declining by 1.3% to 103.9.

Consumer Price Indexes For Specified Consumer Electronics, 1980 - 1982
(December 1977=100, unless otherwise specified)

	1982	1981	1980	% Change 1982/1981	% Change 1982/1980
Appliances, incl. TV & sound equipment*	151.0	146.2	140.5	+ 3.3%	+ 7.5%
Television & sound equipment	108.5	108.5	106.2	--	+ 2.2
Television	103.9	105.3	104.4	- 1.3	- 0.5
Sound equipment	113.7	113.7	108.9	--	+ 4.4

* Base: 1967=100

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In September 1982, SEVENTEEN Magazine conducted a mail survey among several of SEVENTEEN'S consumer panels, representing a cross section of the teenage market. A total of 1,505 returns were received from teenagers attending high school and college.

The purpose of the 1983 Back-to-School survey was to determine the purchasing behavior of teenage girls. Each item was measured in terms of the number of teenage girls currently in school purchasing the item, the number of items purchased and the total expenditures for the item.

Purchases of Selected Consumer Electronics Products by Teenage Students

	Number Purchasing (Add 000's)	Number Purchased (Add 000's)	Total Expenditures (Add 000's)
Pocket calculator	1,587	1,627	$ 31,889
Radio			
Clock	679	687	23,006
Portable/transistor	226	249	13,953
Table model	174	174	8,522
Compact system (Receiver AM/FM, turntable & speakers all purchased together but not in one cabinet)	421	421	126,879
Cassette recorder	675	679	51,364
Cartridge/8-track recorder	153	226	7,341
Portable television	319	334	52,573

Source: SEVENTEEN MAGAZINE
Back-To-School 1983.

Video Cassette Recorders

During January and February, 1983 Merchandising Magazine conducted interviews nationwide among shoppers in major shopping districts in order to determine their ownership and attitudes towards various consumer electronics products.

Merchandising discovered that the price of VCRs weighted heavily on consumers of the product with more than 40% stating that it was their prime consideration when purchasing the product. In addition, over 37% of the respondents who did not own a video cassette recorder felt that the price was just too high for them to be able to afford one at this time.

One out of four respondents stated that they either had or would buy a VCR at a video specialty store while discount operations were the second most frequently mentioned outlet for this kind of purchase.

Video Cassette Recorders

Place /Intended Place of Purchase of VCR's

	Respondents
Total respondents	759
Percent of total:	100.0%
Video specialty stores	25.4
Discounters	18.3
Appliance/TV stores	16.2
Audio/HiFi stores	13.4
Mass merchandisers	12.0
Department stores	8.8
Catalog showroom	5.4
Other	3.4

NOTE: Adds to more than 100% due to multiple responses.

Major Factors in the Purchase of Video Cassette Recorders*

Factors	Main Factor	Second Factor	Third Factor
Price	41.8%	35.0%	20.2%
Features	38.8	37.3	21.9
Brand name	18.0	23.9	53.3
Other factors	1.4	0.3	0.9
None indicated	0.0	3.5	3.7

* Base equals 649 respondents.

Major Factors for Non-Purchase of Video Cassette Recorders

	Respondents
Total respondents	685
Percent of total:	100.0%
Not interested	55.8
Too expensive	37.1
Not familiar with product	8.6
Other reasons	2.2

NOTE: Adds to more than 100.0% due to multiple responses.

Source: Merchandising Magazine, May 1983

CONSUMER BUYING HABITS

Video Cassette Recorders

In order to measure the publics readiness to purchase specified consumer products Chain Store Age in association with Leo J. Shapiro & Associates performed the CSA Second Consumer Buying Intentions Study. A nationally projectable sample of 2,717 households supplemented by interviews with another 6,200 households in 45 metropolitan areas formed the base for the study.

The results indicate that in 1982, 1.7% of all households had purchased a VCR while another 2.5% intended to make a purchase in 1983. Specialty stores were the most commonly mentioned outlet type for these purchases.

Place of Purchase of Video Cassette Recorders
(Percent of Total Respondents)

	1982	1983*
Total respondents	100.0%	100.0%
Specialty stores	39.1	43.9
Mass merchandisers	15.4	14.8
Discounters, incl. K mart	11.7	7.7
Department stores	9.8	8.6
Catalog showrooms	4.2	5.6
Other	19.8	19.4

* Outlet type mentioned by those stating they intended to purchase a VCR in 1983.

Source: Chain Store Age,
December 1982.

Telephones

Nearly 7 out of 10 interviewed in Merchandising Magazine's Eleventh Annual Consumer Survey stated that their main reason for purchasing a telephone was in order to save money on rentals. In addition, more than 40% stated that they had bought or would buy their phone from a retailer other than the telephone company and 46.7% said they had or would install their phones themselves.

The median price of those stating a price paid or expected to pay in the Merchandising survey was $47.44.

Price Paid/Expected to Pay for a Telephone

	Respondents
Total respondents	1,580
Percent of total:	100.0%
Under $20.00	10.4
$20.00 - $39.99	30.6
$40.00 - $69.99	36.2
$70.00 - $99.99	15.5
$100.00 - $149.99	8.3
$150.00 & over	1.8
Median price	$ 47.44

Telephones

Place/Intended Place of Purchase of Telephones

	Respondents
Total respondents	1,535
Percent of total:	100.0%
Retail store other than the phone company	42.4
Phone company store	29.8
Store owned by the phone company	27.0
Received as a gift	10.6
Other	2.0

NOTE: Totals add to more than 100.0% due to multiple responses

Number of Phones Owned in Household Presently

	Respondents
Total respondents	1,927
Percent of total:	100.0%
None	61.4
One or more	38.6
One	18.2
Two	11.7
Three	5.3
Four	2.0
Five	0.9
Six or more	0.5

Reasons for Buying a Telephone

	Respondents
Total respondents	1,510
Percent of total:	100.0%
To save money	68.1
Wanted features	22.8
For style/design	19.9
Other reasons	4.5

NOTE: Totals add to more than 100.0% due to multiple responses.

Source of preceding tables: Merchandising Magazine, May, 1983.

CONSUMER BUYING HABITS

Personal Stereos

There is probably no product which epitomizes the consumer electronics boom more than the personal stereo. Retailers report that as the price of these units has declined, their popularity has continued its long sustained growth. Chain Store Age magazine (December 1982) reports that in 1982 only 16.9% of those shopping for one of these units had no idea of what the unit should cost. Of those who cited a cost, nearly 60% stated that they expected to pay less than $100. Chain Store Age also reports that more than four out of ten potential purchasers responded that price was the reason they would choose a particular store to shop in, with 60% who did buy, doing so in general merchandise chains.

The bulk of the demand for personal stereos is in the East and West where Chain Store Age reports that more than half of all unit sales took place in 1982.

Region of Purchase of Personal Stereos, 1982

	Percent of Purchasers
Total purchasers	100.0%
Region of purchaser:	
New England	7.8
Middle Atlantic	24.4
East North Central	17.9
West North Central	3.3
South Atlantic	7.4
East South Central	5.4
West North Central	4.8
Mountain	12.3
Pacific	16.7

Source: Chain Store Age/ Leo Shapiro & Associates, December 1982.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00) (1982 Edition available now -- 1983 Edition will be available in July, 1983)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1

Footwear (Men's, Women's and Children's)

Including Unpublished Data From The Footwear News Magazine Consumer Buying Pattern Surveys

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1
GENERAL STATISTICS ON THE INDUSTRY..................... 1
  EMPLOYMENT & EARNINGS................................ 5
  INDUSTRY CONCENTRATION............................... 6
  LOCATION OF THE INDUSTRY............................. 8
LEADING MANUFACTURERS AND OPERATING RESULTS............ 9
PRODUCTION...11
SHIPMENTS..16
PRODUCER (FACTORY) PRICES..............................20
FOREIGN TRADE--IMPORTS.................................21
FOREIGN TRADE--EXPORTS.................................25
MARKET SUPPLY..25
RETAIL TRADE...27
  SIZE OF THE MARKET...................................27
  CONSUMER EXPENDITURES................................28
  RETAIL SALES BY OUTLET TYPE..........................28
  SALES BY AREA..29
  SHOE STORES..29
  DEPARTMENT STORES....................................30
  APPAREL SPECIALTY STORES.............................31
ATHLETIC FOOTWEAR MARKET...............................32
BUYING HABITS--MEN'S & WOMEN'S FOOTWEAR................34
BUYING HABITS--TEEN'S FOOTWEAR.........................40

SCHEDULE OF ADDITIONAL FACT FILES......................44

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications

Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-460-0

Printed in the United States of America

MEN'S, WOMEN'S & CHILDREN'S FOOTWEAR

Market Trends

Deteriorating market conditions which were noted in 1981 continued at an accelerated rate in 1982. As economic conditions worsened, consumers cutback on their expenditures. U.S. production of footwear declined by 15%; imports on the other hand, soared 13%, taking a share of almost 60% of the total U.S. market supply in 1982 compared with 53% in 1981.

A number of smaller U.S. footwear plants were closed in 1982. Employment declined almost 10%, with the number of employees averaging 14,000 fewer than in 1981.

Nevertheless, industry analysts are hopeful about 1983 prospects for the nonrubber segment. The shrunken size of the U.S. industry is viewed as a plus. The survivors are more efficient and can operate with lower unit costs at the manufacturing level. They are therefore better able to cope with import competition.

Footwear firms, particularly the larger, integrated operations, fared better in 1982 in terms of net operating income than overall U.S. industry. Although the smaller firms are far less profitable, the general outlook for the footwear industry was considered healthy by the International Trade Commission, and this was a consideration in the decision in May to revoke countervailing duties on shoes imported from Brazil, Spain and India.

The outlook for the rubber/plastics footwear industry in the U.S., however, is far from favorable. This industry has been hurt not only by imports but by a drop in consumer demand.

The trend among retailers has been to delay placing orders, buying as close to the season as possible, particularly among department stores and chain shoe stores. Independents are more inclined to buy early to avoid being caught without needed styles available from competitors.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Bureau of the Census conducts a complete census of U.S. manufactures every five years--the latest covering the year 1977. Between censuses the Bureau conducts annual surveys among a representative sample of manufacturers which are the basis for estimates on key measures of manufacturing activity for industry groups and important industries. These estimates provide a continuous series of basic industry statistics.

According to the census of manufactures, there were 811 manufacturing establishments in the nonrubber footwear industry with value of all products shipped, both primary and secondary, as well as miscellaneous receipts, totaling about $3.9 billion in 1977. For 1981, this value was estimated at $5.5 billion, representing a gain of 41.2% on a current dollar basis.

GENERAL STATISTICS ON THE INDUSTRY

According to the U.S. Industrial Outlook 1983 (U.S. Bureau of Industrial Economics), footwear industry shipments and miscellaneous receipts declined at a compound annual rate of 4.1% in the period 1972-1982 when measured on a constant (1972) dollar basis. A decline of 2.8% in the same measurement was projected for 1983 compared with 1982.

The U.S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981

	1981	1980	1977	% Change 1981/1980
NONRUBBER FOOTWEAR, TOTAL (SIC 314)				
Number of companies	na	na	541	--
Number of establishments#	na	710	811	--
With 20 or more employees	na	562	603	--
Payroll (mil. $)	$1,314.9	$1,203.7	$1,031.5	+ 9.2%
Value added by manufacture (mil. $)**	2,987.5	2,745.3	2,069.4	+ 8.8
Value of industry shipments (mil. $)***	5,496.3	5,106.9	3,891.7	+ 7.6
Capital expenditures, new (mi. $)	104.1	67.9	37.1	+ 53.3
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)				
Number of companies	na	na	115	--
Number of establishments#	na	207	213	--
With 20 or more employees	na	176	180	--
Payroll (mil. $)	$ 518.1	$ 441.6	$ 417.0	+ 17.3%
Value added by manufacture (mil. $)**	1,280.3	1,084.7	871.9	+ 18.0
Value of industry shipments (mil. $)***	2,458.5	2,149.0	1,734.5	+ 14.4
Capital expenditures, new (mil. $)	47.4	22.9	14.5	+107.0
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)				
Number of companies	na	na	243	--
Number of establishments#	na	248	328	--
With 20 or more employees	na	214	241	--
Payroll (mil. $)	$ 494.7	$ 453.4	$ 388.6	+ 9.1%
Value added by manufacture (mil. $)**	1,086.8	955.1	755.0	+ 13.8
Value of industry shipments (mil. $)***	1,913.8	1,733.5	1,361.2	+ 10.4
Capital expenditures, new (mil. $)	29.4	20.0	9.7	+ 47.0
HOUSE SLIPPERS (SIC 3142*)				
Number of companies	na	na	65	--
Number of establishments#	na	68	78	--
With 20 or more employees	na	48	55	--
All employees (thous.)	8.8	9.2	8.1	- 4.3%
Production workers (thous.)	7.5	7.7	7.0	- 2.6
Payroll (mil. $)	$ 75.9	$ 74.0	$ 54.5	+ 2.6
Value added by manufacture (mil. $)**	149.4	190.9	108.8	- 21.7
Value of industry shipments (mil. $)***	268.2	323.1	201.2	- 17.0
Capital expenditures, new (mil. $)	3.5	2.3	2.3	+ 52.2

(continued)

GENERAL STATISTICS ON THE INDUSTRY

The U. S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981
(continued)

	1981	1980	1977	% Change 1981/1980
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)				
Number of companies	na	na	159	--
Number of establishments#	na	164	192	--
With 20 or more employees	na	119	127	--
All employees (thous.)	23.4	26.6	24.8	- 12.0%
Production workers (thous.)	20.4	23.3	21.8	- 12.4
Payroll (mil. $)	$ 226.2	$ 234.7	$ 171.4	- 3.6
Value added by manufacture (mil. $)**	471.1	514.7	333.7	- 8.5
Value of industry shipments (mil. $)***	855.7	901.3	594.8	- 5.1
Capital expenditures, new (mil. $)	23.8	21.3	10.6	+ 11.7
RUBBER & PLASTICS FOOTWEAR (SIC 302*)				
Number of companies	na	na	67	--
Number of establishments#	na	68	84	--
With 20 or more employees	na	44	50	--
Payroll (mil. $)	$ 147.3	$ 174.3	$ 159.1	- 15.4%
Value added by manufacture (mil. $)**	360.1	307.7	272.3	+ 17.0
Value of industry shipments (mil. $)***	707.3	590.8	517.0	+ 19.7
Capital expenditures, new (mil. $)	14.9	12.5	11.3	+ 19.2
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)				
Number of companies	na	na	174	--
Number of establishments#	na	175	190	--
With 20 or more employees	na	96	96	--
All employees (thous.)	9.8	10.0	8.5	- 2.0
Production workers (thous.)	8.4	8.7	7.4	- 3.4
Payroll (mil. $)	$ 105.5	$ 93.1	$ 65.3	+ 13.3
Value added by manufacture (mil. $)**	219.6	196.3	109.4	+ 11.9
Value of industry shipments (mil. $)***	488.4	431.5	270.6	+ 13.2
Capital expenditures, new (mil. $)	8.4	6.3	3.0	+ 33.3

na = not available

# Each business location is counted as a separate establishment. Figures for 1980 are from the U.S. Bureau of the Census, County Business Patterns.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below. (SIC 314 is a composite of industries in 3142, 3143, 3144)

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

(Footnotes continued)

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

SIC 3142 comprises establishments primarily engaged in the production of house slippers of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

SIC 302 comprises establishments primarily engaged in manufacturing all-rubber and plastics footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. There are two segments in this industry, (1) protective footwear, such as hunting boots, galoshes and overshoes; and (2) rubber-soled fabric upper footwear, such as athletic footwear, sneakers, sport oxfords and specialties designed for leisure wear.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

**Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

***Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. This value should be clearly distinguished from the total value of footwear made by all producers, including those who make footwear as a secondary product and who are classified in other industries. This total product value is shown in the tables on pages 17 and 18.

Source: U.S. Bureau of the Census
Census of Manufactures, 1977;
Annual Surveys of Manufactures; 1980, 1981.

GENERAL STATISTICS ON THE INDUSTRY

Explanation of other terms used in this Fact File:

> Nonrubber footwear: Includes shoes, boots and slippers made by "conventional" processes, such as cemented, welt, slip-lasted, etc., and shoes with rubber sole vulcanized to leather uppers. (Footwear covered in SIC 314)
>
> Rubber/plastic footwear: Footwear with rubber or plastic soles/fabric uppers and rubber or plastic protective footwear. (SIC 302)

Employment & Earnings

Employment in the U.S. footwear manufacturing industry continued to decline. In 1958 the nonrubber footwear industry employed close to 157,000 people; by 1982 employment averaged under 129,000.

Compared with the average in 1981, total employment in nonrubber footwear manufacturing in 1982 registered a drop of 9.7%. Employment in men's footwear manufacturing dropped 11.2% compared with a 9.1% drop in the women's nonrubber footwear segment. Average employment in rubber/plastics footwear manufacturing in 1982 declined 4.0% from the previous year's level.

Pressure from imports and a sluggish U.S. economy continued to affect activity in the U.S. footwear industry in 1983. As of March, according to the Bureau of Labor Statistics, there were 123,400 employees in the nonrubber footwear industry, representing a decline of almost 5%, or 5,900 people, compared with the same month of 1982.

While the number of workers declined, average weekly earnings registered gains in 1982 compared with 1981. Weekly working hours declined in the nonrubber footwear industry.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings in the U.S. Footwear Industry, 1980 - 1982

	Annual Average Employment (in Thousands)					
	Total Employees			Production Workers		
	1982	1981	1980	1982	1981	1980
Nonrubber footwear, total	128.8	142.6	143.6	109.8	122.7	122.9
Men's, except athletic	50.8	57.2	55.2	41.9	49.0	47.5
Women's, except athletic	48.1	52.9	56.2	41.9	45.5	47.8
Rubber/plastics footwear	21.3	22.2	22.3	18.4	19.6	19.8

	Production Workers					
	Avg. Weekly Hours			Avg. Weekly Earnings		
	1982	1981	1980	1982	1981	1980
Nonrubber footwear, total	35.1	36.3	36.5	$179.71	$174.97	$161.33
Men's, except athletic	35.3	37.4	37.2	188.86	188.87	172.98
Women's, except athletic	34.8	35.3	35.7	174.35	165.20	152.08
Rubber/plastics footwear	37.8	37.4	40.3	193.91	178.40	178.53

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings.

Industry Concentration

The footwear industry is composed primarily of a large number of privately-owned companies. According to the Bureau of Industrial Economics 70% of the producers make under one million pairs annually. These producers account for only about 17% of total production. Twenty-two producers, each with annual production of more than four million pairs, account for over 50% of total nonrubber footwear production. In 1969 manufacturers of this size accounted for only 37% of the total output.

About 300 companies with 10 or more employees were producing nonrubber footwear in 1981. The number of factories operated by these companies showed a net decline in 1981. Nineteen new factories started up, but 38 closed down, bringing the total down to 594. Under pressure from imports and from poor economic conditions through mid-1982 an additional 12 footwear factories closed. Meanwhile, four new factories started operations, bringing the total operating to 586.

The trend toward greater concentration of footwear production among large companies able to withstand the competition of imports is expected to continue. The strongest companies have started or expanded their own importing operations, while weaker companies closed plants or went out of business.

GENERAL STATISTICS ON THE INDUSTRY

Industry Concentration

Share of Industry Shipments Accounted for by the Largest Companies--1972, 1977

	Companies (number)	Value of Industry Shipments				
		Total (mil. $)	% accounted for by largest companies			
			Top 4	Top 8	Top 20	Top 50
Men's footwear, exc. athl.						
1977	115	$1,734.5	31%	46%	73%	95%
1972	118	1,288.9	34	51	74	95
Women's footwear, exc. athl.						
1977	243	1,361.2	29	39	56	79
1972	294	1,346.1	32	42	56	76
Other, exc. rubber/plastic footwear						
1977	159	594.8	24	41	68	91
1972	153	485.8	30	42	65	87
Slippers						
1977	65	201.2	44	64	87	99
1972	83	151.4	39	58	80	97
Rubber/plastics footwear*						
1977	67	517.0	58	73	95	99+
1972	82	600.0	59	70	89	99

*The U.S. Bureau of Industrial Economics (1983 U.S. Industrial Outlook) places the number of establishments producing rubber/plastics footwear at 50 at the present time.

Source: U.S. Bureau of the Census, 1977 Census of Manufactur
Concentration Ratios in Manufacturing (MC77-SR-9).

Concentration of the footwear industry based on employment size has been reported by the U.S. Bureau of the Census for 1980 as noted below.

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1980

	Establishments		Total Employees	
	Number	%	Number	%
Footwear, exc. rubber/plastics	710	100.0	132,614	100.0
Employment size classification:				
Under 10	103	14.5	332	0.2
10 to 49	130	18.3	3,767	2.8
50 to 99	81	11.4	6,256	4.7
100 to 249	166	23.4	28,686	21.6
250 to 499	198	27.9	69,195	52.2
500 to 999	27	3.8	29,378	18.4
1,000+	5	0.7		

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Industry Concentration

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1980
(continued)

	Establishments		Total Employees	
	Number	%	Number	%
Rubber/plastics footwear	68	100.0	18,217	100.0
Under 50	32	47.0	na	--
50 to 99	6	8.8	440	2.4
100 to 249	9	13.2	na	--
250 to 499	11	16.2	3,684	20.2
500 to 999	5	7.4	3,735	20.5
1,000+	5	7.4	8,559	47.0

na = not available

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

Location of the Industry

The footwear industry in the U.S. continues to be concentrated in New England, although this area has shared in the decline in U.S. production in recent years. In 1980, according to the data compiled by the Census Bureau, New England accounted for 29.1% of total industry payrolls and 27.4% of total industry employment.

Employment & Payroll For Nonrubber Footwear Producers By Geographic Area, 1980

Geographic Area	Employment	Payroll (000)
United States	126,052	$1,146,495
New England Division	34,534	333,490
Maine	16,004	152,747
Massachusetts	10,888	109,337
New Hampshire	7,642	71,406
Middle Atlantic Division	18,243	169,895
New Jersey	1,028	11,773
New York	6,744	54,061
Pennsylvania	10,471	104,061
North Central Region	29,384	277,766
Ohio	3,915	33,079
Illinois	3,085	32,064
Wisconsin	3,813	39,960
Missouri	14,724	127,389
Other States	3,847	44,734

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Employment & Payroll For Nonrubber Footwear Producers By Geographic Area, 1980 (continued)

Geographic Area	Employment	Payroll (000)
South & West Regions	43,010	$ 358,737
Virginia	(D)	(D)
North Carolina	3,246	29,514
Tennessee	12,749	114,389
California	3,188	31,089
Maryland	749	6,316
Georgia	1,213	8,319
Florida	1,767	13,855
Kentucky	3,049	19,630
Arkansas	6,515	48,162
Texas	4,174	38,658
Hawaii	70	780
Other States	6,290	48,025
Geographic Areas n.s.k.*	881	6,607

*Represents estimated data for establishments of small companies, typically those with fewer than five employees, that were not included in the mailing panel.

(D) Data withheld to avoid disclosing figures for individual companies

Source: Current Industrial Reports, MA-31A, U.S. Bureau of the Census

LEADING MANUFACTURERS AND OPERATING RESULTS

Operating profits in the footwear divisions of the 10 leading manufacturers had a mixed record in 1982, as noted in the following table. In about half of the companies profits were higher, in the rest lower than in 1981. Composite sales of footwear among the 10 leaders amounted to over $3.3 billion last year, registering an 8.1% gain over the 1981 total.

Sales & Profits of Leading Publicly-Held Footwear Manufacturers, 1981, 1982

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution to Total Company: Sales		Footwear's % Contribution to Total Company: Operating Profit	
	1982	1981	1982	1981	1982	1981	1982	1981
U.S. Shoe Corp.	$670.9	$630.3	$72.0	$61.9	53%	58%	55%	53%
Nike, Inc.	580.3	398.9	nr	nr	89	92	nr	nr
Interco, Inc.	546.0	587.0	57.1	78.4	21	22	28	30

(continued)

LEADING MANUFACTURERS AND OPERATING RESULTS

Sales & Profits of Leading Publicly-Held Footwear Manufacturers, 1981, 1982
(continued)

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution to Total Company: Sales		Footwear's % Contribution to Total Company: Operating Profit	
	1982	1981	1982	1981	1982	1981	1982	1981
Genesco, Inc.	$482.0	$483.6	$17.7	$37.4	72	73	59	73
Wolverine World Wide*	316.9	299.1	23.7	28.4	nr	nr	nr	nr
Stride Rite Corp.	224.8	194.8	22.5	19.0	100	100	100	100
Chesebrough-Pond's, Inc. (G.H. Bass & Co.)	140.2	122.5	17.8	12.5	9	8	8	6
R.G. Barry Corp.	134.0	141.1	4.2	5.4	100	100	100	100
Suave Shoe Corp.	121.9	117.0	12.7	12.9	nr	94	nr	95
Weyenberg Manufacturing	97.5	92.3	6.4	5.7	100	100	100	100

NOTE: Footwear sales and operating profit include both manufacturing and retailing operations, where applicable.

nr = not reported.

*Figures are total company sales.

Source: Fairchild Market Research Division
based on annual reports.

Annual operating ratios compiled by Dun & Bradstreet for the year 1982 showed the effects of the poor economy. The ratio of current liabilities to inventory in the nonrubber footwear industry were a typical 86.8%, up from 85.8% in 1980. Return on net sales decreased to 3.2% in 1982 compared with 3.9% in 1980.

Selected Key Business Ratios For Nonrubber Footwear Manufacturers, 1980, 1982
(Median Results)

	1982	1980
Number of reporting manufacturers	103	119
Current liabilities to inventory (%)	86.8	85.8
Total liabilities to net worth (%)	72.8	73.6
Net sales to inventory (times)	6.3	5.7
Total assets to net sales	46.4	44.9
Return on net sales (%)	3.2	3.9
Return on total assets (%)	6.7	7.6
Return on net worth (%)	14.0	14.5

Source: Dun & Bradstreet, Dun's Business Month.

LEADING MANUFACTURERS AND OPERATING RESULTS

Based on 10-K reports filed by publicly owned companies with the Securities & Exchange Commission, Schonfeld & Associates, a Chicago-based consulting company, has compiled data on advertising ratios as a percent of sales and as a percent of gross margin (sales minus cost of goods sold). Averages reported for 1981 compared with 1976 are noted below.

Advertising & Promotion Expenditures by Nonrubber Footwear Manufacturers
Percent of Sales & of Gross Margins, 1976, 1981

	% of Sales	% of Gross Margins
1981	3.0	8.2
1976	1.8	5.5

Source: Advertising Age, Oct. 3, 1977; Aug. 2, 1982

PRODUCTION

Capacity utilization in the footwear industry in the U.S. continued to decline in 1982. According to the U.S. Bureau of the Census, the industry operated at 75.8% of capacity in 1981. In 1982, however, capacity utilization was reported to have dropped to an estimated 67% due to the recession and to imports of footwear. The under-utilization of capacity appeared to be concentrated in the small- and medium-size private companies.

Nonrubber Footwear

Domestic production of nonrubber footwear continued to slide in 1982. A total of 331.4 million pairs were produced, which was almost 13% below the 1981 total and 14.2% below 1980 production. Continued high interest rates which affected producers' cost, competition from imports and a sharp drop in consumer demand contributed to the decline.

Reversing the results for the previous year, in 1982 production of men's nonrubber footwear was curtailed at a sharper rate than women's (22% vs. 10%). Output of boots for men declined 33%, due particularly to a decline in demand for Western-style boots, while production of women's boots registered a gain of about 14%.

Nonrubber athletic footwear registered the first decline in production in recent years--down 4.1% in 1982 compared with 1981.

Rubber/Plastics Footwear

The rubber/plastics footwear industry is composed of two distinct product classes: (1) rubber and plastics protective footwear--such as hunting boots, galoshes, gaiters, rubbers and industrial protective footwear, and (2) rubber or plastic-soled footwear with fabric upper (tennis shoes, sneakers, nonleather athletic footwear, and specialties, such as espadrilles, for leisure use).

PRODUCTION

Rubber/Plastics Footwear

Production of rubber/plastic-soled/fabric-upper footwear dropped to 75 million pairs, according to preliminary data for 1982, which was 21.3% below the 1981 level. Imports have increased to the point where they exceed U.S. output, but they, too, declined in 1982. In addition, trade reports reflect a growing preference on the part of consumers for the less-expensive leather athletic footwear, turning away from canvas types. Leather, it is reported, has a status image that has greater appeal for the athletic customer, particularly the younger group.

Production of rubber/plastic protective footwear, on the other hand, registered a sharp rise of 33.5% in 1982 compared with 1981, reaching over 14 million pairs. This reversed the sharp decline reported for the year 1981.

U.S. Production of Footwear by Type, 1980-1982
(Thousands of Pairs)

	1982(p)	1981(r)	1980(r)	% Change 1982/1981
Footwear, nonrubber & rubber/plastics, total	420,882	486,593	498,300	- 13.5%
Nonrubber footwear, including slippers, total	331,388	380,383	386,311	- 12.9
Shoes & boots, incl. athletic footwear, total	263,684	305,721	313,400	- 13.7
Men's (except athletic)	68,778	87,836	88,215	- 21.7
Shoes, dress & casual	40,399	51,431	52,317	- 21.4
Boots, dress & casual	10,698	15,970	14,076	- 33.0
Work shoes (ankle height or higher)	17,441	20,102	21,487	- 13.2
Type not specified	241	333	335	- 27.6
Youths' & boys' (except athletic)	7,352	11,341	13,766	- 35.2
Women's (except athletic)	123,909	137,973	142,954	- 10.2
Sandals	113,080	20,643	18,073	+ 38.6
Casual, except sandals		60,954	65,081	
Dress		46,576	49,869	
Boots (ankle height or higher)	9,976	8,762	8,856	+ 13.8
Type not specified	853	1,038	1,075	- 17.8
Misses' (except athletic)	10,109	10,169	11,268	- 0.6
Children's (except athletic)	12,978	13,884	14,707	- 6.5
Infants' & babies'	18,882	23,912	23,650	- 21.0
Athletic shoes, exc. those with sole vulcanized to fabric upper	16,637	15,976	15,038	- 4.1
Designed for sports	nr	5,172	4,451	--
All other (joggers, etc.)	nr	10,804	10,587	--
Up to size 3	--	1,807	1,902	--
Size 3 & over	--	8,997	8,685	--
All other shoes, exc. those with sole vulcanized to fabric upper & rubber & plastic protective footwear (includes ballet & other theatrical shoes)	4,030	3,557	2,698	+ 13.3
Shoes, exc. men's & women's type not specified	1,009	1,073	1,104	- 6.0

(continued)

U.S. Production of Footwear by Type, 1980-1982
(Thousands of Pairs)
(continued)

	1982(p)	1981(r)	1980(r)	% Change 1982/1981
Slippers	67,704	74,662	72,911	- 9.3%
Men's & youths', boys'	nr	20,547	19,420	--
Women's & misses'	nr	46,952	46,870	--
Children's, infants', babies'	nr	6,497	5,971	--
Type not specified	--	666	650	--
Rubber or plastic sole/fabric upper footwear (sneakers, certain athletic shoes, etc.) total	75,049	95,392	97,516	- 21.3
Rubber/plastic protective footwear	14,445	10,818	14,473	+ 33.5
Rubber upper protective footwear	nr	4,977	6,602	--
Boots	--	1,515	2,034	--
Lumberman & pacs	--	nr	nr	--
Arctics & gaiters	--	1,043	11,203	--
Light & heavy rubbers	--	nr	nr	--
Plastic upper protective footwear	nr	4,863	7,871	--
Fabric upper protective footwear	nr	978	nr	--

(p) preliminary
(r) revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31A).

Boots

For the year 1981 the U.S. Census Bureau provided some detail on production of boots not previously reported. U.S. output of Western-style boots for men totaled over 11 million pairs in 1981. Western boot sales, however, dipped sharply by mid-1982 after two years of extraordinary growth. Changes in style preference and the recession caused consumers to switch their buying to more traditional types of footwear.

Recap
Boots: Summary of U.S. Production, 1981, 1982
(Thousands of Pairs)

	1982	1981
Boots, except rubber/plastic, total	--	28,483
Men's boots, total	10,698	15,970
Dress & casual	nr	4,922
Western style	nr	11,048
Youths' & boys' boots	nr	1,257
Women's boots, ankle height or higher	9,976	8,762
Misses' boots	nr	788
Children's boots	nr	1,706
Boots, rubber upper	nr	1,515

nr = not reported.

Source: U.S. Bureau of the Census, Current Industrial Reports.

PRODUCTION

Seasonal Pattern in Production

Percent of Year's Total Production by U.S. Manufacturers, by Months, 1982
(Based on quantity)

	Nonrubber Footwear Total *	Men's Youths' Boys'	Women's & Misses'	Other, Including Athletic
Total, year 1982	100.0%	100.0%	100.0%	100.0%
January	8.1	8.3	8.1	9.5
February	8.4	7.9	8.2	9.6
March	9.6	9.2	9.2	10.8
April	8.3	8.1	8.1	8.9
May	8.6	8.8	8.6	8.8
June	8.6	8.7	8.4	8.0
July	7.2	7.1	8.5	6.0
August	8.5	8.7	8.4	8.1
September	8.7	8.7	8.8	7.8
October	8.7	9.0	8.2	8.2
November	7.9	8.1	7.7	7.3
December	7.1	7.4	7.7	6.9

* Includes slippers and other nonrubber footwear not separately reported.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

By Geographic Region of the U.S.

While overall production of nonrubber footwear in the U.S. declined by 1.5% in 1981 compared with 1980, production in the Middle Atlantic Division registered a gain. This was due to a 1.2% increase in output in Pennsylvania and a 7.0% increase in footwear production in New Jersey. Output in other regions declined, but New England still held on to the largest share of production (23.4% in 1981). The North Central States accounted for 22.7%.

PRODUCTION

By Geographic Region of the U.S.

Production of Nonrubber Footwear by Geographic Area & by Leading States--1980, 1981

	Thousands of Pairs		Percent of Total	
	1981	1980	1981	1980
Nonrubber footwear, total	380,383	386,311	100.0%	100.0%
New England Division	89,169	91,935	23.4	23.8
Maine	45,024	46,738	11.8	12.1
Massachusetts	27,458	27,638	7.2	7.2
New Hampshire	16,686	17,559	4.4	4.5
Middle Atlantic Division	79,094	75,511	20.0	19.5
New Jersey	12,926	12,070	3.4	3.1
New York	24,889	25,615	6.5	6.6
Pennsylvania	38,279	37,826	10.1	9.8
North Central Region	86,212	87,207	22.7	22.6
Ohio	18,626	16,449	4.9	4.3
Illinois	7,440	6,086	1.9	1.6
Wisconsin	7,992	7,600	2.1	2.0
Missouri	40,261	45,131	10.6	11.7
Other states	11,963	11,941	3.1	3.1
South & West Regions	125,707	128,406	33.0	33.2
Tennessee	33,728	32,612	8.9	8.4
Arkansas	15,924	17,154	4.2	4.4
Texas	14,022	14,152	3.7	3.7
Other states	62,033	64,488	16.3	16.7
Other*	3,202	3,252	0.8	0.8

* Estimated data for very small companies not included in the mailing panel.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA31A)

Materials

Prices of cattlehide leather continued to decline in 1982 from the record highs of 1979. For the year 1982, producer prices averaged 2.2% below the 1981 level. Leather-uppers accounted for a larger share of nonrubber footwear production in 1982 than in 1981 or 1980, although a total production of footwear with leather uppers declined.

PRODUCTION

Materials

Production of Nonrubber Footwear by Material in Uppers

	1982		1981		1980	
	Mil. Pairs	%	Mil. Pairs	%	Mil. Pairs	%
Total production	331.4	100.0	380.4	100.0	386.3	100.0
Type of upper:						
Leather	179.6	54.2	198.2	52.1	203.7	52.7
Plastic (vinyl)	75.2	22.7	97.0	25.5	108.6	28.1
Other	76.6	23.1	82.1	21.6	70.9	18.4
Not specified	--	--	3.1	0.8	3.2	0.8

Source: Based on U.S. Bureau of the Census reports.

While production of footwear by U.S. manufacturers declined in 1982, shoes with leather uppers accounted for a greater share of men's shoes and of women's shoes. As noted, trade reports indicate a swing to leather uppers in the athletic footwear category; however, data for 1982 from the Census Bureau indicates that leather uppers in the nonrubber athletic footwear category that year accounted for a smaller share (55.5%) of production than in 1981 (59.8%).

Leather's Share of Production of Selected Types of Nonrubber Footwear

	1982	1981	1980
Leather uppers in			
Men's shoes, except athletic	90.8%	87.6%	86.7%
Women's shoes, except athletic	56.2	53.2	54.8
Athletic footwear	55.5	59.8	68.6

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

SHIPMENTS

In May 1983 the U.S. Bureau of the Census issued a report on Value of Product Shipments for U.S. industries based on the 1981 Annual Survey of Manufactures, which provides the most comprehensive coverage of manufacturing activity in the years between the complete census which is conducted every five years (the most recent covering the year 1977).

The 1981 annual survey placed the value of U.S. manufacturers' shipments of nonrubber footwear at $5,221.3 million--considerably higher than preliminary estimates for the year 1981 issued by the Census Bureau in the Current Industrial Reports series, which placed the value of nonrubber footwear shipments at $4,834.1 million.

SHIPMENTS

The 1981 total of $5,221.3 million was 8.5% over the 1980 total. Preliminary reports for 1982 indicate a decline of over 13% in value of U.S. shipments compared with 1981, with the sharpest drop registered in men's footwear--led by the decline in demand for Western-style boots.

According to the U.S. Bureau of Industrial Economics (1983 U.S. Industrial Outlook), shipments of nonrubber footwear, on a constant (1972) dollar basis, declined in value at a compound annual rate of 4.3% in the period 1972-1982. A decline of 2.8% is projected for the year 1983 compared with 1982 (constant dollar basis). Under pressure of imports and recession, several major domestic producers of women's footwear closed down in 1982. Shipments of women's footwear, therefore, are expected to show the sharpest decline, in real terms, of any class in 1983--down an estimated 4.0% compared with 1982, according to the Bureau.

According to the 1981 Annual Survey of Manufactures, shipments of rubber/plastics footwear in 1981 reached a value of $560.7 million, which was 11.6% higher than the 1980 total. The rise was surprising in view of the rise in imports to the point where they now exceed U.S. production. Imports were particularly high in the first half of 1981 when importers stepped up activity to beat the rise in tariffs which became effective July 1.

The U.S. Bureau of Industrial Economics reported that in terms of 1972 dollars, shipment values for rubber/plastic footwear declined 4.1% annually from 1972 to 1980, then dropped another 9% in 1981 and a further 3% in 1982. A decline of another 3% for 1983 was forecast due to sluggish overall markets and continued strong imports. The level of consumer demand for running and jogging shoes will heavily influence domestic shipments.

Value of Footwear Shipments, 1977, 1979-1981
(Millions of Dollars)

	1981	1980	1979	1977	% Change 1981/77
Total, all footwear	$5,782.0	$5,316.2	$4,739.6	$4,141.9	+ 39.6%
Nonrubber footwear, total	5,221.3	4,813.7	4,261.2	3,737.1	+ 39.7
House slippers	268.1	322.5	258.4	190.2	+ 41.0
Men's footwear, exc. athletic	2,156.3	1,879.9	1,748.9	1,592.1	+ 35.4
Work shoes & boots	545.3	494.9	490.9	421.7	+ 29.3
Dress & casual boots	558.0	444.1	350.5	271.0	+105.9
Dress & casual shoes	1,038.8	923.0	893.0	872.5	+ 19.1
Type not specified (estimated)	14.1	17.9	14.4	26.9	- 47.6
Women's footwear, except athletic	1,995.0	1,828.7	1,617.2	1,368.8	+ 43.9
Boots (ankle height & higher)	269.6	185.0	232.5	232.2	+ 16.1
Sandals	242.9	204.1	185.0	102.8	+136.3
Casual shoes, except sandals	797.0	726.3	550.7	524.6	+ 51.9
Dress shoes	657.1	671.9	637.5	480.6	+ 36.7
Type not specified	28.5	41.4	11.5	46.6	- 38.8

(continued)

Value of Footwear Shipments, 1977, 1979-1981
(Millions of Dollars)
(continued)

	1981	1980	1979	1977	% Change 1981/77
Other nonrubber footwear, incl. athletic footwear	801.9	782.6	636.7	568.0	+ 41.2
Youths' & boys', exc. athletic	112.0	117.8	98.4	98.3	+ 13.9
Infants' & babies'	143.6	131.4	98.7	80.9	+ 77.5
Misses' & preteens', exc. athletic	95.5	80.1	88.5	90.9	+ 5.1
Children's, except athletic	126.5	115.1	103.0	114.0	+ 11.0
Other, including athletic	290.8	289.3	246.5	151.3	+ 92.2
Type not specified	33.5	48.8	1.6	32.6	+ 2.8
Rubber & plastics footwear, total	560.7	502.5	478.4	404.8	+ 38.5

Source: U.S. Bureau of the Census, Annual Survey of Manufactures, Value of Product Shipments (M81(AS)-2) (Issued May 1982).

Based on preliminary Bureau of the Census data for 1982, the U.S. industry shipped 335.2 million pairs of nonrubber footwear that year, representing a loss of 11.1% compared with the 1981 total. In 1981 shipments were 2% below 1980.

Preliminary figures indicate total shipments of rubber/plastic sole-fabric upper footwear by domestic producers amounted to only about 76 million pairs in 1982. These figures, however, are subject to revision. The 1981 total was reported at 92.8 million pairs, down 4.8% compared with 1980. Protective footwear shipments dropped 21% to reach 11.5 million pairs in 1981. Figures for 1982 are not available. As previously noted, production of rubber/plastic-fabric upper footwear in 1982 was 21.3% below the 1981 total; protective footwear output, however, was up 33.5% in pairage.

Shipments of Nonrubber Footwear by Type, 1980, 1981
(Thousands of Pairs)

	1981	1980
Nonrubber footwear, total	377,240	384,926
Shoes, except rubber	302,354	314,086
Men's (except athletic)	87,974	91,177
Dress & casual shoes	52,704	54,607
Boots, Western style	10,918	*
Boots, dress & casual	4,090	14,521
Workshoes, ankle height or higher	19,923	21,698
Type not specified**	339	351
Youths' & boys' (except athletic)	10,785	12,774

(continued)

SHIPMENTS

Shipments of Nonrubber Footwear by Type, 1980, 1981
(Thousands of Pairs)
(continued)

	1981	1980
Women's (except athletic)	136,594	140,789
Sandals	20,836	18,200
Casual shoes, except sandals	62,068	63,938
Dress shoes	43,869	48,813
Boots, ankle height or higher	8,806	8,778
Type not specified**	1,015	1,060
Misses' (except athletic)	10,142	10,910
Children's (except athletic)	13,646	14,803
Infants' & babies'	23,375	25,014
Athletic footwear	15,107	14,723
All other	3,570	2,727
Shoes, except men's & women's type not specified**	1,161	1,169
Slippers	74,886	70,840
Men's, youths' & boys'	19,191	19,297
Women's & misses'	49,499	45,439
Children's, infants' & babies'	5,519	5,464
Type not specified**	677	640

(r) = revised
* Included with dress and casual boots in 1980
** Estimated data for shipments by small companies not included in the mailing panel.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31A (81)-1), issued January 1983

Shipments of Rubber/Plastics Footwear, 1980, 1981
(Thousands of Pairs)

	1981	1980
Footwear with rubber or plastic soles vulcanized to fabric uppers	92,852	97,516
Espadrilles Fabric upper cement process	2,161	nr
All other	90,691	nr
Vulcanized	24,449	--
Other, including injection molded	66,242	--
Rubber/plastic protective footwear	11,464	14,473
Rubber upper	5,367	6,819
Plastic upper	5,157	7,838
Fabric upper	940	nr

nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA31A(81)-1), issued January 1983

SHIPMENTS

Boots

Recap

Shipments of Boots of All Types, 1979-1981

	Quantity (thous. pairs) 1981	1980	1979	Value (millions of $) 1981	1980	1979
Total, all types of boots	25,599	25,738	28,812	$838.0	$720.8	$626.1
Nonrubber--men's						
Dress & casual boots	4,090	14,521	12,254	108.7	483.9	344.0
Western style	10,918			440.4		
Nonrubber--women's						
Boots, ankle height & higher	8,806	8,778	14,182	264.3	207.3	258.8
Rubber boots	1,785	2,439	1,776	24.6	29.6	23.3

Source: U.S. Bureau of the Census, Current Industrial Reports.

Shipments By Class of Customer

Distribution of Manufacturers' Sales of Shoes & Slippers
By Class of Customer, 1980
(Not Including Rubber/Plastic Footwear)

	Type of Footwear				
	Men's Shoes, Exc. Athletic	Women's Shoes, Exc. Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	22.9	18.4	37.9	23.1	5.6
Independent retailers	27.0	32.0	10.6	28.5	22.7
All other retailers	38.5	39.1	22.7	29.0	59.3
Wholesalers	8.2	7.4	28.3	18.5	10.2
All others, incl. govt. & for export	3.4	3.1	0.8	0.9	2.2
Total sales (mil. $)	$2,000.2	$1,763.6	$245.9	$469.4	$253.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Series MA-31A.

PRODUCER (FACTORY) PRICES

According to the Footwear Industries Association (FIA), the average factory price for a pair of nonrubber footwear was $12.49, down 2.1% compared with the 1981 average. This was a reflection of the intense competitive pressure from lower-priced imports and the need to liquidate excessive inventories as a result of a severe recession in the U.S. economy.

PRODUCER (FACTORY) PRICES

While producer (factory) price levels for leather were down in 1982 compared with the previous year, the overall wholesale price index for nonrubber shoes registered a modest gain of 1.7%. In 1981, the index went up 3.3%. Price levels in men's footwear and in children's rose more than in women's footwear.

In rubber/plastics footwear, wholesale prices in 1982 averaged 2.7% above the 1981 level, but compared with a 3.6% gain in 1981.

Footwear Producer (Factory) Price Index, 1980-1982
(1967 = 100)

	Annual Averages			% Change	% Change
	1982	1981(r)	1980	1982/1981	1981/1980
All commodities	299.3	293.4	268.4	+ 2.0%	+ 9.3%
Cattle hides	350.2	366.3	366.8	- 4.4	- 0.1
All leathers	311.3	319.8	310.6	- 2.6	+ 3.0
Cattle-hide leather	314.1	321.3	314.1	- 2.2	+ 2.3
Nonrubber footwear	245.0	240.9	233.1	+ 1.7	+ 3.3
Men's footwear	283.9	275.3	261.5	+ 3.1	+ 5.3
Women's footwear	220.2	220.0	216.5	+ 0.1	+ 1.6
Children's footwear	206.1	200.2	192.9	+ 2.9	+ 3.8
Rubber/plastic footwear	225.4	219.5	211.9	+ 2.7	+ 3.6

(r) = revised

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imports of nonrubber footwear increased sharply in 1982--up about 28% in quantity, over 24% in value compared with 1981. This was reported to be primarily due to the removal in mid-1981 of the Orderly Marketing Agreements (OMA's) with Korea and Taiwan and the strength of the U.S. dollar compared with other world currencies.

Sixty-nine percent of all U.S. nonrubber footwear imports last year came from Taiwan, Korea and Italy. Taiwan, alone, accounted for 183.2 million pairs, or over 38% of the total, with the total gaining 54.2% compared with 1981. Shipments from Korea more than doubled in 1982 compared with 1981, reaching 90.6 million pairs, or 18.9% of the import total.

The average price of all nonrubber footwear (at first port of entry into the U.S.) was $6.43 in 1982, down 2.6% from the average of $6.60 in 1981. The average factory price of domestic production, on the other hand, was about double the imported price.

While imports of nonrubber footwear took a sharp jump in 1982, imports of rubber/plastics footwear declined almost 23% in quantity and over 39% in value compared with 1981. Much of this was due to a switch from rubber/plastics footwear to avoid high ad valorem tariffs on this type which resulted from the ending of the

FOREIGN TRADE

Imports

American Selling Price (ASP) valuation systems, and it was also a reflection of growing preference on the part of American consumers for inexpensive leather athletic footwear rather than canvas types.

According to data compiled by the Footwear Industries Association, in 1982 imports accounted for 59.5% of the total U.S. market supply of footwear, up from 52.6% in 1982. For nonrubber footwear, imports' share was 59.8% (50.4% in 1981); in rubber/plastics footwear, imports' garnered a 58% share in 1982 (59.6% in 1981).

Of nonrubber footwear, the share held by imports was largest in athletic types (84% in 1982) and in women's footwear (65.9%).

Import Penetration of Market by Kind of Footwear

	% of U.S. Market	
	1982	1981
Nonrubber footwear		
Men's	58.3%	40.4%
Youths' & boys'	48.6	39.6
Women's	65.9	60.3
Misses'	58.9	52.8
Children's	59.8	47.6
Infants'	40.8	32.9
Athletic	84.0	78.2
Slippers*	4.6	6.4

*Due to problems in definition, import penetration represented in Department of Commerce data is estimated to be understated by about 75%.

Source: Footwear Industries of America based on U.S. Department of Commerce reports.

Imports of nonrubber footwear into the U.S. come chiefly from seven countries which accounted for close to 90% of the total quantity in 1982. As previously noted, Taiwan topped the list, as it did in 1981.

Leading Countries of Origin For Nonrubber Footwear Imports, 1981, 1982

	Million Pairs		% Change
	1982	1981	1982/1981
Taiwan	183.2	118.8	+ 54.2%
Korea	90.6	44.0	+106.0
Italy	57.4	50.2	+ 14.3
Spain	22.2	19.0	+ 16.8
Brazil	41.1	43.0	- 4.4
Hong Kong	24.5	28.3	- 13.4
Philippines	10.1	13.2	- 23.5

Source: Footwear Industries Association based on U.S. Department of Commerce reports

FOREIGN TRADE

Imports

Rubber/Plastics Footwear Imports by Country of Origin, 1981, 1982

	Million Pairs		% Change
	1982	1981	1982/1981
Taiwan	36.3	61.9	- 41.4%
Korea	38.0	48.6	- 21.8
China	13.7	12.0	+ 14.2
Italy	2.5	3.6	- 30.6
Hong Kong	2.5	3.4	- 26.5
Mexico	7.0	6.4	+ 9.4
All other	3.6	4.6	- 21.7

Source: Footwear Industries Association based on U.S. Department of Commerce reports.

FOREIGN TRADE

Imports

U.S. Footwear Imports by Type, 1980, 1981

	1982					1981		% Change 1982/1981	
	Pairs (Mil.)	% of Total	Value # (Mil. $)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value # (Mil. $)	Pairs	Value
Footwear, total	607.4	100.0%	$3,414.6	100.0%	$ 5.62	541.1	$3,122.2	+ 12.2%	+ 9.4%
Nonrubber footwear, total	479.7	79.0	3,083.9	90.2	6.43	375.6	2,481.0	+ 27.7	+ 24.3
Rubber/plastics footwear, total	127.7	21.0	334.7	9.8	2.62	165.5	641.2	- 22.8	- 47.8
By type of footwear:									
Men's & boys', total	160.3	26.4	1,178.9	34.5	7.35	143.1	1,103.9	+ 12.0	+ 6.8
Women's & misses', total	262.9	43.3	1,610.2	47.1	6.12	269.3	1,590.4	- 2.4	+ 1.2
Children's & infants', total	38.8	6.4	116.5	3.4	3.00	39.8	115.3	- 2.5	+ 1.0
Type not specified, total	145.3	23.9	512.9	15.0	3.53	88.9	312.6	+ 63.4	+ 64.1
Dress & casual footwear, total	266.8	43.9	1,900.6	55.6	7.12	234.0	1,705.6	+ 14.0	+ 11.4
Leather uppers, total (N)	130.7	21.5	1,380.5	40.4	10.56	118.2	1,213.6	+ 10.5	+ 13.7
Men's & boys'	30.0	4.9	389.0	11.4	12.94	23.7	322.8	+ 26.5	+ 20.5
Women's & children's	99.6	16.4	977.5	28.6	9.82	93.0	867.4	+ 7.1	+ 12.7
Other, not specified	1.0	0.2	14.1	0.4	13.40	1.4	23.4	- 28.6	- 94.0
Lined vinyl uppers, total (N)	136.2	22.4	520.1	15.2	3.82	115.8	492.0	+ 17.6	+ 5.7
Men's & boys'	21.5	3.5	96.5	2.8	4.50	22.3	109.8	- 3.6	- 12.1
Women's & children's	102.1	16.8	386.9	11.3	3.79	84.5	353.4	+ 20.8	+ 9.5
Children's & infants'	12.5	2.1	36.7	1.1	2.92	9.0	28.8	+ 38.9	+ 27.4
Athletic, total	185.0	30.5	932.5	27.3	5.04	194.1	1,058.4	- 4.7	- 11.9
Leather uppers, total (N)	76.9	12.7	582.7	17.0	7.58	49.3	393.4	+ 55.9	+ 48.1
Men's & boys'	57.1	9.4	456.1	13.3	7.98	39.9	331.0	+ 43.1	+ 37.8
Women's & children's	19.5	3.2	123.1	3.6	6.32	9.3	60.1	+109.7	+104.8
Ski boots	0.3	**	3.4	0.1	11.40	0.2	2.3	+ 50.0	+ 47.8
Fabric uppers, total (R)	98.0	16.1	272.7	8.0	2.78	136.8	599.0	- 28.4	- 54.5
Joggers	10.5	1.7	40.9	1.2	3.89	*	*	--	--
Sneakers	51.7	8.5	168.8	4.9	3.26	*	*	--	--
Others	35.8	5.9	63.0	1.8	1.76	*	*	--	--
Lined vinyl uppers, total (R)	10.1	1.7	77.2	2.3	7.65	8.0	66.0	+ 26.3	+ 17.0
Men's & boys'	6.3	1.0	26.5	0.8	4.21	4.8	25.1	+ 31.3	+ 5.6
Women's & misses'	2.1	0.3	9.1	0.3	4.29	1.9	9.4	+ 10.5	- 3.2
Children's & infants'	0.6	0.1	2.2	**	3.41	0.4	1.4	+ 50.0	+ 57.1
Ski boots	1.0	0.2	39.3	1.1	38.68	0.8	30.1	+ 25.0	+ 30.6
Work footwear, leather, total (N)	6.8	1.1	84.0	2.4	12.22	4.8	56.3	+ 41.7	+ 49.2
Boots & protective footwear, nonleather, total (R)	11.1	1.8	56.2	1.6	5.06	7.5	35.0	+ 48.0	+ 60.6
Other footwear, total	137.5	22.6	445.2	13.0	3.24	100.7	266.8	+ 36.5	+ 66.9
Unsupported rubber or plastic, total (N)	26.1	4.3	93.7	2.7	3.59	24.7	97.4	+ 5.7	- 3.7
Men's & boys'	3.5	0.6	14.4	0.4	4.11	3.7	16.8	- 5.4	- 14.3
Women's & misses'	20.0	3.3	72.7	2.1	3.64	19.0	75.6	+ 5.3	- 3.8
Children's & infants'	2.6	0.4	6.6	0.2	2.54	2.1	5.0	+ 23.8	+ 32.0
Zories (R)	18.6	3.1	5.9	0.2	0.32	21.3	7.2	- 12.7	- 18.1
Fiber uppers (N)	22.3	3.7	62.8	1.8	2.81	16.4	44.1	+ 36.0	+ 42.4
Wood (N)	3.0	0.5	18.3	0.5	6.01	7.5	43.2	- 60.0	- 57.6
Other (N)	67.5	11.1	264.5	7.7	3.92	30.9	74.9	+118.4	+253.1

(N) = Nonrubber
(R) = Rubber

# The import value is the wholesale value at the first port of entry in the U.S. It includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise to the U.S.

* 1981 information unavailable because a different classification system was used in 1982.

** Less than 0.1%

Source: Fairchild Market Research Department
based on U.S. Department of Commerce,
Bureau of the Census data.

FOREIGN TRADE

Exports

After two years of solid growth in footwear exports by the U.S., the strength of the U.S. dollar, which made domestic products more expensive for foreign buyers, reversed the trend. Exports of nonrubber footwear declined under nine million pairs, almost 21% below the 1981 total. The f.a.s. (free alongside ship) value of exported footwear dropped 15.5%. Exports accounted for only 2.6% in quantity and 2.3% in value of domestic shipments.

U.S. footwear exports are mostly of the athletic, western boot, men's casual, work and hunting boot types. One hundred different countries receive these exports and Canada is the major market. Increasing quantities of cut footwear parts are being exported by the U.S. to nearby Central American countries, assembled there with low labor costs and reexported to the U.S.

U.S. exports are not only adversely affected by the strength of the dollar, but also by quotas established by potential buyers, including Canada and Japan.

Quantity & Value of U.S. Exports of Nonrubber Footwear, 1981, 1982
(In millions)

	1982	1981	% Change 1982/1981
Pairs	8.89	11.18	- 20.5%
Value (f.a.s.)	$ 101.6	$ 120.2	- 15.5
Average value ($ per pair)	$ 11.43	$ 10.76	+ 6.2

Source: American Footwear Industries Association and U.S. Department of Commerce

MARKET SUPPLY

Market Supply Summary For 1982

		1982	% Change 1982/1981
Total footwear supply in the U.S.	Mil. pairs	980.8	- 0 -
Nonrubber	Mil. pairs	802.2	+ 7.7%
Rubber/fabric	Mil. pairs	178.6	- 24.3
Import share of total supply	Percent	59.5	+ 13.1
Nonrubber	Percent	59.8	+ 18.7
Rubber/fabric	Percent	58.0	- 2.7
Market supply by types--nonrubber			
Men's market	Mil. pairs	164.9	+ 11.9
Import share	Percent	58.3	+ 44.3
Women's market	Mil. pairs	363.1	+ 4.3
Import share	Percent	65.9	+ 9.3

(continued)

MARKET SUPPLY

Market Supply Summary For 1982
(continued)

		1982	% Change 1982/1981
Market supply by types--nonrubber (cont'd.)			
Juvenile market	Mil. pairs	103.2	+ 0.8%
Import share	Percent	52.1	+ 23.8
Athletic market	Mil. pairs	103.6	+ 41.3
Import share	Percent	84.0	+ 7.4
Market by material--nonrubber			
Leather footwear	Mil. pairs	394.1	+ 6.0
Import value	Percent	54.4	+ 17.5
Vinyl/plastic footwear	Mil. pairs	249.9	- 0.2
Import share	Percent	69.9	+ 14.8
Other footwear	Mil. pairs	167.1	+ 25.0
Import share	Percent	54.2	+ 42.0

Source: Footwear Industries of America, Quarterly Report (May 5, 1983)

Market Supply by Type of Footwear, 1981, 1982
(Quantity in millions of pairs)

	1982	1981	% Change 1982/1981
Total footwear (nonrubber & rubber/plastic)			
Domestic	406.4	475.8	- 14.6%
Imports	583.3	516.1	+ 13.0
Exports **	8.9	11.2	- 20.5
Market supply	980.8	980.7	0 -
Import penetration (%)	59.5	52.6	+ 6.9 points
Nonrubber footwear			
Domestic	331.4	380.4	- 12.9
Imports	479.7	375.6	+ 27.7
Exports	8.9	11.2	- 20.5
Market supply	802.2	744.8	+ 7.7
Import penetration (%)	59.8	50.4	+ 9.4 points
Rubber/plastic footwear			
Domestic	75.0	95.4	- 21.3
Imports	103.6	140.5	- 26.3
Market supply	178.6	235.9	- 24.3
Import penetration (%)	58.0	59.6	- 1.6 points

* Nonrubber only

Note: Figures differ somewhat from later revised shipment figures reported in the Shipments section.

Source: Footwear Industries of America based on U.S. Department of Commerce reports.

RETAIL TRADE

Size of the Market

By the year 1990 the U.S. population is expected to increase by about 14%, reaching a total of close to 268 million people, compared to the present level of about 234 million. This projection is based on the middle of three different assumptions as to future fertility rates, mortality and immigration.

The fastest growing age segment is 35 to 54 years of age. An increase of over 56% is expected in the number of people of this age by 1990, and they will represent 30% of the total population compared with only 22.1% in 1983.

Population Productions--1983-2000 *

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 5 years	8,173	9,369	8,601	- 1.3	7.2	7.3	6.3
5 to 9 years	7,793	9,080	9,157	+ 17.5	6.5	7.1	6.6
10 to 15 years	10,417	9,791	11,419	+ 9.6	8.7	7.6	8.3
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.2	34.3	37.7	+ 17.1			
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4	100.0	100.0	100.0
Under 5 years	9,133	9,831	9,024	- 1.2	8.0	8.1	6.9
5 to 9 years	8,155	9,519	9,601	+ 17.7	7.1	7.8	7.4
10 to 15 years	10,892	10,240	11,968	+ 9.9	9.6	8.4	9.2
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

* Middle series projections (out of three) which assumes a fertility rate of 2.1, or at the replacement level.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Series P-25, No. 922
(October 1982)

RETAIL TRADE

Consumer Expenditures

Preliminary data issued by the U.S. Department of Commerce places the total value of consumer spending for footwear at $19.710 billion in 1982, representing a gain of 3.2% over the 1981 total of $19.095 billion. On a constant dollar basis, however, eliminating the effects of inflation, the real gain in spending shrank to less than 1%. The share of total consumer expenditures going for footwear in 1982 was 1.0%, down slightly from its 1981 share and comparing with 1.2% in 1972.

Trade sources indicate that spending for women's and girls' footwear in 1982 amounted to $11.6 billion; for men's and boys', 7.3 billion, infants', about $800 million.

Of all spending for apparel and footwear in 1982, footwear represented 16.6%, down slightly from 16.7% in 1981.

Retail Sales by Outlet Type

Shoe stores--particularly family shoe stores--command the major share of footwear retail sales in the U.S. An analysis by Footwear Industries of America placed the 1981/1982 share of the total market held by shoe stores at about 45%.

In an analysis of retail trends by FMI, Inc., Nashville (a service which monitors footwear purchases) this spring, it was pointed out that the U.S. footwear market had been in a highly volatile state in recent months. Promotional activity had increased significantly and discounters had increased their market share while conventional shoe stores had lost part of theirs. Factory outlets, it was reported, are a small but rapidly growing segment of the market, particularly in the Northeast. (Footwear News, April 11, 1983).

Estimated Retail Sales of Footwear by Type of Outlet
1981, Projected 1982

	1981		1982 Projected	
	Mil. $	%	Mil. $	%
Total footwear sales	$18,700	100.0%	$20,200	100.0%
Stores with reported payrolls				
Department stores (incl. traditionals, discounters, Penney-Sears-Ward stores & similar retail organizations)	4,200	22.5	4,520	22.4
Other general merchandise stores, nec	385	2.0	400	2.0
Variety stores	295	1.6	310	1.5
Shoe stores (incl. chains, independents)	8,320	44.5	9,150	45.3
Apparel stores	1,100	5.9	1,150	5.7
Mail order houses	310	1.6	340	1.7
Other stores with payroll	590	3.2	630	3.1
Owner-operated shops, lease arrangements, etc. (stores not reporting payrolls)	3,500	18.7	3,700	18.3

nec = not elsewhere classified.

Source: Footwear Industries of America data published in Stores, February 1982.

RETAIL TRADE

Sales by Area

Based on information compiled for 1980 by Sales & Marketing Management on retail sales of footwear by states, the biggest share of volume was concentrated in the Middle Atlantic States (17.2%), followed by East North Central States (16.9%).

Distribution of Footwear Retail Sales by Area

Total U.S.	100.0%
New England (Conn., Me., Mass., N.H., R.I., Vt.)	6.6
Middle Atlantic (N.J., N.Y., Pa.)	17.2
East North Central (Ill., Ind., Mich., Ohio, Wis.)	16.9
West North Central (Ia., Kans., Minn., Mo., Nev., N.D., S.D.)	6.7
South Atlantic (Del., D.C., Fla., Ga., Md., N.C., S.C., Va., W.Va.)	15.5
East South Central (Ala., Ky., Miss., Tenn.)	5.5
West South Central (Ark., La., Okla., Tex.)	11.5
Mountain (Ariz., Colo., Id., Mont., Nev., N.M., Utah, Wyo.)	5.0
Pacific (Calif., Ore., Wash., Alas., Haw.)	15.1

Source: Sales & Marketing Management, (October 26, 1981).

Shoe Stores

The U.S. Census Bureau has recently issued revised figures on retail store sales back to 1973. The revised data has resulted in downgrading the share of total shoe store sales accounted for by multi-unit organizations (with 11 or more stores).

Total shoe store sales in 1982 gained 6.2% over the 1981 figure, reaching over $9.8 billion. Multi-units accounted for 44% of the 1982 total, up from 41.5% the previous year. In the first five months of 1983, shoe store sales were up 3.2% compared with the same 1982 period.

The latest data on shoe store sales by type of shoe store is in the 1977 Census of Retail Trade (U.S. Bureau of the Census). In that year men's shoe stores accounted for 12.1% of shoe store business; women's shoe stores, 23.2%; family shoe stores, 62.1%; children's shoe stores, 2.6%.

Shoe Store Sales, 1979-1982
(Millions of Dollars)

					% Change		
	1982	1981(r)	1980(r)	1979(r)	1982/81	1981/80	1980/79
Shoe store sales, total	$9,854	$9,279	$8,307	$7,688	+ 6.2%	+11.7%	+ 8.0%
Chain shoe stores (11 or more store orgs.)	4,337	3,854	3,457	3,816	+12.5	+11.5	+ 8.5
% of shoe store total	44.0%	41.5%	41.6%	41.4%			

(r) revised

Source: U.S. Bureau of the Census.

RETAIL SALES

Shoe Stores

Shoe store sales should increase to about $10.6 billion in 1983 compared with $9.9 billion in 1982, according to U.S. Commerce Department projections. The expected gain of about 7.0% compares with a projected growth rate of 5.6% in sales of all types of non-durable goods stores. In the first five months of 1983 shoe store sales were up 3.2% compared with the same 1982 period, while chain store sales were up 7.6% over the same time period. (Consumer prices for footwear as of May 1983 averaged only 0.7% above the year-ago level.)

Seasonal Patterns in Shoe Store Sales, 1979-82
Percent of Year's Sales by Months

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1982	7.1	6.4	8.1	8.9	8.2	7.5	7.5	8.7	8.6	8.6	8.7	11.5	100.0%
1981(r)	6.9	5.9	7.5	9.3	8.2	7.8	7.4	8.7	8.5	9.0	8.6	12.1	100.0
1980(r)	7.0	6.0	7.8	8.7	8.1	7.5	7.2	9.0	8.6	9.0	9.3	11.7	100.0
1979(r)	6.4	5.4	7.9	8.7	7.9	7.8	7.2	9.1	8.9	9.3	9.3	12.0	100.0

Dates of Easter: 1982-April 11; 1981-April 19; 1980-April 6; 1979-April 15.

(r) revised

Source: Based on U.S. Bureau of the Census,
Monthly Retail Sales & Inventories
(BR-13).

Department Stores

Total Department Store Sales, 1979-1982
(Millions of Dollars)

				% Change		
1982	1981(r)	1980(r)	1979(r)	1982/81	1981/80	1980/79
$107,030	$103,672	$ 93,345	$ 89,159	+ 3.2%	+ 11.1%	+ 4.7%

(r) revised

Source: U.S. Bureau of the Census,
Current Business Reports
(BR-13-80S)

In the typical department store which had a total volume over $1 million, footwear departments (upstairs store) contributed 4.8% of total store sales in 1981, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 3.9% of total store sales. Men's footwear accounted for a median 0.8%; children's, 0.3%. (Percents do not add to 4.8% as not all stores report on each of the three footwear types. Medians are separately calculated for each shoe type.)

Compared with 1980, footwear sales in the typical department store gained 12.1%. Women's dress and casual shoes had a median increase of 11.8% among reporting stores.

RETAIL TRADE

Department Stores

Department Store Footwear Departments: Selected Operating Ratios, 1981
(Stores With A Total Volume Over $1 Million)
(Median Results -- Upstairs Departments)

	Total All Shoes	Total Women's, Misses', Junior Shoes	Women's & Misses' Dress/Cas. Shoes	Junior & Teen Shoes	Men's Footwear	Children's Footwear
(Number reporting)	(43)	(24)	(34)	(33)	(36)	(30)
Cumulative markon, %	50.9	51.4	52.0	50.9	48.4	48.7
Markdowns, % of net sales	16.9	19.4	18.4	16.3	13.0	11.4
Gross margin, % of net sales	44.5	43.7	45.4	45.3	43.4	44.8
Net sales, % chg. 1981/80	+12.1	+11.8	+15.5	+25.1	+10.7	+ 6.8
Net sales, % of total store	4.8	3.9	3.1	0.8	0.8	0.3
Returns, % of gross sales	12.2	12.2	14.5	11.7	9.3	7.1
$ sales per sq. ft. of selling space	$157.3	$148.5	$175.1	$217.9	$122.9	$47.0
Stock turns (times)	2.3	2.3	2.4	2.6	1.6	1.6

Source: National Retail Merchants Association, Merchandising & Operating Results, (1982 Edition)

Apparel Specialty Stores

The typical women's wear and family apparel store registered a gain of 13.6% in footwear sales in 1981 compared with 1980, according to the National Retail Merchants Association.

In men's wear stores, according to the Menswear Retailers of America, footwear sales showed a typical decline of 0.7% in stores handling men's/boys' wear only, and a rise of 0.3% in men's wear stores which also sell women's wear in 1980 compared with 1979. Results were better in 1981--and were reported at +12.4% and +5.3%, respectively, compared with the previous year.

Women's Specialty Stores & Family Clothing Stores: Selected Operating Ratios For Footwear Departments, 1981
(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (10*)	
Cumulative markon, %	52.2
Net sales, % of change from 1980	+ 13.6
Net sales, % of total share	4.6
Markdowns, % of net sales	21.5
Gross margin, % of net sales	42.8
Stock turns (times)	2.1

*The number of reporting companies.

Source: National Retail Merchants Association, Merchandising & Operating Results, (1982 Edition).

RETAIL TRADE

Apparel Specialty Stores

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1981

(Median Results)

	% of Total Shoe Sales	% Change in Sales 1981/1980	Markdowns % of Men's Shoe Sales	Stock Turns Per Year (times)
Men's & boys' shoes:				
In men's wear stores handling men's wear only	5.0% (31)	+12.4% (26)	11.9% (16)	1.1 (15)
In men's wear stores which also sell women's wear	4.2% (40)	+ 5.3% (34)	11.5% (29)	1.4 (22)

Note: Figures in parentheses cover the number of reporting firms in each ratio.

Source: Menswear Retailers of America,
Annual Business Survey, June 1982.

ATHLETIC FOOTWEAR MARKET

After registering phenomenal growth in sales in recent years, the market for athletic footwear has been slowing down. The recession had much to do with this, of course, but other factors are involved. The market for many types of athletic footwear has become saturated; consumers own as many pairs as they need or want in many cases. Interest in jogging or running, which sparked a major share of the athletic footwear business, has begun to subside. In addition, teenagers represent the biggest customers for many types of athletic footwear. Not only do they represent a very fickle group with fast-changing tastes, but their number in the population is on the decline.

Nevertheless, the market remains much bigger than it was just a few years ago. Many running shoe customers--estimated as high as 75% of the total--buy these shoes for other purposes than running. The number of people buying running or jogging shoes is still two or three times what it was in 1970. The hard-core runner, the 25% of customers who buy shoes for the active sport, is generally older and more affluent--able and willing to pay more for their footwear. This segment of the jogging shoe market is being actively wooed by the manufacturers who continue major efforts to develop new, better-performing, more expensive styles to meet the needs of this demanding group.

A sharp downturn in the market for court shoes developed in the past year. Imports are the major factor in this market, and as noted these declined in 1982 along with domestic production of rubber/fabric footwear.

Marketers have picked up some of the lost trade in sales of less expensive types of leather athletic footwear, and there has been a growing market for shoes described as "athleisure footwear", for the customer who wants the "look" of athletic styles, as well as "designer" sport shoes.

ATHLETIC FOOTWEAR MARKET

The total retail market for athletic/sports footwear in 1982 is estimated at $1.9 billion by The National Sporting Goods Association. This was 5.6% above the 1981 total. The gain for 1983 is expected to fall short of last year's gain.

Nike is a major factor in the industry, with U.S. sales reported at over $650 million (manufacturers' prices) in 1982--compared with $225 million in athletic footwear sales by the second largest manufacturer, Adidas. (SportStyle, May 23, 1983)

Since Nike is such a large element in the domestic market, a breakdown on their footwear sales by type of athletic footwear gives an indication of the market profile.

U.S. Sales of Footwear By Nike, Fiscal Year 1982*

	Percent
Footwear, total	100.0%
Running	40.7
Basketball	24.9
Tennis/other racquet ball	10.1
Children's	18.3
Field sports	2.3
Leisure	2.4
Other	1.3

* 12 months ending May 31, 1982

A market analysis by Dean Witter Reynolds Inc. (Footwear News, July 26, 1982) projected growth in the market for higher-quality adult athletic footwear in the period 1982-1987 at 10%.

U.S. Market (Millions of $)

	Size 1982*	Growth Rate 1982-87	Size 1987
Higher-quality adult athletic footwear	$2.0-2.5	10%	$3.2-4.0
Higher quality children's shoes	$0.8-1.0	10%-12%	$1.3-1.8
Leisure & work shoes	$4.0	10%	$6.4

*Estimates of market size depend on how broadly one defines the market.

Source: Dean Witter Reynolds Inc.

According to a report in SportStyle, April 25, 1983, based on NSGA data, the leading retail outlets for many sport shoe categories, including basketball, running, racquetball and soccer are the specialty stores. Golf pro shops sold the most golf shoes; discount stores, the most baseball shoes; department stores, the most tennis shoes, gym shoes or sneakers.

BUYING HABITS--MEN'S & WOMEN'S FOOTWEAR

Footwear purchases are monitored on a regular basis covering four-month periods by FMI (Footwear Market Index), conducted by Kormos & Associates, Nashville, Tenn. Purchase records for each period, covering footwear for men, women, girls, boys, and infants, are obtained through mailings to three demographically balanced panels of 40,000 households each.

Following are findings on shoe types purchased and on place of purchase based on records filed by consumers nationwide over a 12-month span, from September 1981 through August 1982.

Percent of Purchases (Pairs), Sept. 1981-Aug. 1982

WOMEN'S FOOTWEAR

Style		Place of Purchase	
Total purchases	100%	Total purchases	100%
Sandals, wedges	36	Shoe stores	45
Casual, boat, jeans shoes	20	Department stores	17
Pumps, other dress shoes	18	Discount stores	12
Athletic/tennis shoes	16	National catalog chains	12
Other (incl. boots)	10	Other (sporting goods stores, etc.)	14

MEN'S FOOTWEAR

Total purchases	100%	Total purchases	100%
Athletic/tennis	36	Shoe stores	39
Dress shoes, dress boots	30	Discount stores	14
Casual/boat/jeans shoes/ sandals	13	National catalog chains	14
Work shoes/boots	12	Department stores	8
Western/casual boots	5	Sporting goods stores	5
Other footwear	4	Mail order houses	4
		Other outlets	15

Note: columns may not add to 100% due to rounding.

Additional details on footwear purchases compiled in the FMI are published monthly in Footwear News Magazine, starting in January 1983.

The following information is based on a survey conducted for Footwear News Magazine by the Home Testing Institute in the Fall of 1981 which covered 500 women and 410 men. This is a continuation of reports based on this survey which were included in the 1982 edition of the Footwear Fact File.

Athletic Footwear

A profile of the adult customer for athletic footwear (including sneakers), based on the Footwear News Magazine survey shows the expected above-average interest among men and women 18 to 34 years of age compared with older adults, but a fairly even representation in each income group (although the upscale customer is more likely to be a multiple-pair buyer).

BUYING HABITS--MEN'S & WOMEN'S FOOTWEAR

Athletic Footwear

Profile of Athletic Footwear Purchasers
(Percent of respondents)

	Women					Men				
	Athletic Footwear		# Pairs Owned At Start of Fall/ Winter Season			Athletic Footwear		# Pairs Owned At Start of Fall/ Winter Season		
	Purchased in Past Year	Expect to Buy Over Next Year	None	One	Two+	Purchased in Past Year	Expect to Buy Over Next Year	None	One	Two+
Total 18 & over	70%	61%	31%	38%	31%	51%	42%	42%	29%	29%
Working	70	58	27	40	33	52	42	38	31	32
Not working	70	64	35	37	28	47	44	58	22	20
Age: Under 35	83	72	19	45	36	71	60	22	38	40
35 +	68	59	33	37	30	44	37	49	26	25
Income (000)										
Under $25	70	64	31	46	23	50	43	50	28	22
$25-$34.9	68	59	36	30	34	50	41	42	27	31
$35 +	74	57	20	35	45	54	44	28	33	39
Where most footwear is purchased:										
Downtown bus. dist.	70	62	35	34	31	52	54	49	27	24
Shop. Cen./Mall	71	61	28	40	32	52	41	38	29	33
Suburb/Neighborhood	66	63	32	36	32	51	37	49	28	23
Fashion stance:										
Forerunner	74	65	37	33	30	68	57	32	39	29
Other	70	61	30	39	31	53	44	42	28	30
Plans to purchase footwear over next year: Plan to buy										
3 pair or more	--	72	26	40	24	--	69	27	35	38
Less than 3 pair	--	32	43	35	22	--	27	51	25	24

Athletic Footwear Purchases In Past Year
Total & by Selected Groups

					Age			
		Under	Income (000)			Under	Income (000)	
Purchased past 12 months:	Total	35 Yrs.	Under $25	$25 +	Total	35 Yrs.	Under $25	$25 +
None	33%	19%	33%	30%	55%	32%	58%	53%
One pair	33	40	34	29	30	43	30	30
Two pairs	18	21	16	18	11	19	9	11
Three or more	16	21	17	23	4	6	3	6
Total	100%	100%	100%	100%	100%	100%	100%	100%

Note: columns may not add to 100% due to rounding.

BUYING HABITS--MEN'S & WOMEN'S FOOTWEAR

Athletic Footwear

Results of a Consumer Buying Intentions Study, by Leo Shapiro & Associates for Chain Store Age (published in CSA, General Merchandise Edition, December 1982) indicated a strong disposition to buy athletic footwear in 1983. Twenty-eight percent of those interviewed thought they might buy athletic shoes and 36.1% of these potential customers had actively looked for them in the first month--the highest incidence for both men's and women's apparel.

The bulk of the retail dollars that athletic shoes will be pulling in, according to the CSA report, will come from men, mainly the 20-24 age group, and the fitness-conscious 30-35- and 40-45-year old women were less likely than men to buy athletic shoes, according to the Shapiro study.

Men were more likely than women to buy athletic shoes at a catalog chain, particularly Sears. Four-fifths of the men said they would buy shoes in the same type of store where they originally looked; 74.1% of the women gave this answer.

Women are more concerned about price in buying athletic footwear than men.

Reasons For Choosing A Particular Store in Buying Athletic Footwear

	Percent of Respondents	
	Women	Men
Price	39.2%	28.1%
Selection	15.7	29.7
Quality	9.8	12.5
Convenience	2.0	9.4
Satisfaction	11.8	14.1
Other/don't know	21.5	6.2

Source: Chain Store Age/Leo Shapiro & Associates

The median price men expected to pay for athletic footwear was $29.80; for women, $21.80.

BUYING HABITS--MEN

In the survey among 410 men conducted for Footwear News Magazine by the Home Testing Institute in the Fall of 1981, respondents were asked which they usually consider to be a better value--shoes in a discount store or shoes at sale price in other stores. Over 80% of the men (as well as women) said the latter type offered the better buy.

Distribution of Responses on Which Offers A Better Value--Shoes In A Discount Store Or Shoes On Sale In Other Outlet Types--By Respondent Characteristics

	Discount Store	Other Outlets	No Answer
Men 18 years & over (Total = 100%)	12.4	82.4	5.1
By age:			
Under 35	17.3	76.0	6.7
35 & older	10.8	84.6	4.6
Income (000)			
Under $25	16.9	78.5	4.6
$25-$35	7.3	86.5	6.3
$35 +	7.3	88.5	4.2
Where most shoes are purchased:			
Downtown business section	12.7	83.1	4.2
Shopping center/mall	12.4	83.1	4.5
Suburban/neighborhood stores	14.9	81.1	4.1
Expect to buy 3 or more pairs of shoes in next 12 months	12.8	81.2	6.0
Working	11.1	84.1	4.8
Not working	16.8	76.8	6.3

Of those who feel that discount stores offer the best value in footwear, most said they received information on current offerings through newspaper advertising (men, 51%; women, 61%). "Shopping the stores" was the usual source of information for 26% of the women, 33% of the men.

Sources of Information On Discount Stores' Shoe Offerings

Total male respondents who feel discount stores offer the best value:	100.0%
Newspaper advertising	51.0
Shopping the stores	33.0
Mailings by the stores	9.8
Word of mouth-friends, relatives	15.7
Television	7.8
Radio	2.0

The FN Magazine survey conducted by Home Testing Institute showed that most men buy their shoes in stores located in shopping centers or malls. Men with higher incomes ($35,000 and up) preferred stores in downtown business areas to a greater extent than lower income males, while those with incomes under $25,000 were above average in preference for shoe retailers in suburban locations.

BUYING HABITS--MEN

Location of Stores Where Survey Respondents Buy Most Footwear

		Age		Household Income (thous.)		
	Total	Under 35	35 +	Under $25	$25-$35	$35 & over
Total respondents	410	104	306	195	96	96
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
In a downtown business area	17.3	19.2	16.7	14.9	18.8	21.9
In a shopping center/mall	59.0	60.6	58.5	59.0	61.5	54.2
In a suburban or neighborhood store	18.0	21.2	17.0	22.6	12.5	16.7
In a shopping strip	4.9	1.9	5.9	4.6	4.2	7.3
Buy mostly by mail order	8.5	2.9	10.5	6.7	9.4	8.3
No answer	0.7	--	1.0	1.0	--	1.0

Note: Columns may not add to 100% due to multiple responses.

BUYING HABITS--WOMEN

In the survey among 500 women conducted for Footwear News Magazine by the Home Testing Institute in the Fall of 1981, respondents were asked which they usually consider to be a better value--shoes in a discount store or shoes at sale price in other stores. Over 80 percent of the women interviewed said the latter.

Discount stores were stronger than average among those under 35 years of age, those with incomes under $35,000.

Distribution of Responses On Which Offers A Better Value -- Shoes In A Discount Store Or Shoes On Sale In Other Outlet Types -- By Respondent Characteristics

	Discount Store	Other Outlets	No Answer
Women 18 years & over (Total = 100%)	11.4%	84.8%	3.8%
By age:			
Under 35	20.0	80.0	--
35 & older	9.7	85.7	4.5
Income (000)			
Under $25	13.8	82.5	3.7
$25-$35	13.0	83.2	3.8
$35 +	4.8	92.4	2.9
Where most shoes are purchased:			
Downtown business section	10.4	85.7	3.9
Shopping center/mall	10.2	86.6	3.2
Suburban/neighborhood stores	21.0	75.8	3.2
Expect to buy 3 or more pairs of shoes in the next 12 months	11.8	85.7	2.5
Fashion forerunner (concerned with newest look)	14.8	81.5	3.7
Working	11.7	84.2	4.2
Not working	11.2	85.3	3.4

BUYING HABITS--WOMEN

Among women who consider discount stores as offering the best value in shoes, newspaper advertising was the chief source of information on discount store offerings.

Sources of Information On Discount Stores' Shoe Offerings

Total respondents who feel discount stores offer best value in shoes	100.0%
Newspaper advertising	61.4
Shopping the stores	26.3
Mailings by the stores	17.5
Word-of-mouth, friends/relatives	14.0
Television	7.0
Radio	5.3

Most women reporting in the Footwear News Magazine survey, conducted by Home Testing Institute, said they buy most of their footwear in shopping centers or malls (68.6%). The percentage was highest among women with incomes of $35,000 or more (76.2%) and women under 35 years of age (72%). Stores in downtown business areas were the second most frequently mentioned location, particularly among women who do not have any children under 18 at home (19.9%), and by women who want to be in the forefront of fashion (18.5%).

Shoe retailers in suburban or neighborhood areas are favored by 12.4%, overall and by a higher percentage of women without children (16.3%).

Location of Stores Where Survey Respondents Buy Most Footwear
(Percent of Respondents)

		Age		Household Income (thous.)			Fashion
	Total	Under 35	35 +	Under $25	$25-$35	$35 & over	Forerunner
Total respondents	500	75	421	246	131	105	54
Percent	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
In a downtown business area	15.4	13.3	15.9	15.4	16.8	15.2	18.5
In a shopping center or mall	68.6	72.0	67.9	67.9	64.1	76.2	75.9
In a suburban or neighborhood store	12.4	14.7	11.9	13.4	13.7	8.6	3.7
In a shopping strip	3.0	4.0	2.9	2.8	3.8	1.9	1.9
Buy mostly by mail	5.6	1.3	6.2	5.3	6.1	3.8	--
No answer	0.2	--	0.2	--	0.8	--	--

Note: Columns may not add to 100% due to multiple responses.

BUYING HABITS--TEENS' FOOTWEAR

The FN Magazine survey revealed that mothers with children under 18 at home are much more likely to buy shoes for themselves in a shopping center than are women without children, although this was the location for shoe purchases most frequently mentioned in both instances.

Women who do not have any children at home are more likely than other women surveyed to buy their footwear in downtown stores and in suburban or neighborhood stores, in shopping strips, or to buy their shoes by mail.

It should be noted, however, that the characteristics of women in the survey sample who did not have children at home under 18 years of age differed from these with children in other terms. The former included a higher percentage of women 50 years of age and over (57% vs. 14.5%); a greater percentage who were not working (58% vs. 42%) and who had incomes under $18,000 (26% vs. 19%). Only 16% of the women with no children under 18 at home who were covered in the survey had household incomes of $35,000 or more, compared with 23% of the women with children.

Shopping centers seem to command more loyalty than noted for other locations. Among the mothers of teenagers (boys and girls) who buy most of their own shoes in shopping centers, close to 88% buy most of their teen children's shoes in centers or malls. Among mothers who buy most of their own shoes in suburban or neighborhood stores, 74% also buy their teens' shoes there; the comparable percent among downtown business area shoppers, 62%.

Location for Most Shoe Purchases--For Mothers & For Children
(Percent of Respondents)

	Own Shoe Purchases By Women		Shoe Purchases By Mothers of Teenagers (13-17)--			
	With No Children Under 18 At Home	With Children Under 18 At Home	Girls		Boys	
			For Self	For Daughter	For Self	For Son
No. of respondents	141	359	174	174	172	172
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Where most shoes are purchased						
In a downtown business area	19.9	13.6	13.8	12.1	12.8	14.0
In a shopping center or mall	59.6	72.1	70.7	73.6	73.8	68.6
In a suburban or neighborhood store	16.3	10.9	12.1	11.5	10.5	16.3
In a "shopping strip"	3.5	2.8	2.3	2.9	3.5	1.2
Usually by mail order	8.5	4.5	1.7	1.7	7.0	0.6
No answer	0.3	--	0.6	--	--	--

Note: Columns may add to more than 100.0% due to multiple responses.

Source: Home Testing Institute Survey for
Footwear News Magazine
(September 1981)

BUYING HABITS--TEENS' FOOTWEAR

Stores in shopping centers or malls are shopped for teen boys' to a lesser degree than noted for girls'; on the other hand, suburban or neighborhood stores and those in downtown business areas register stronger among mothers' reporting on shoe purchases for sons--stronger than noted in the pattern on mothers' own shoe purchases.

In the Footwear News Magazine survey, mothers were asked to evaluate the factors they consider important in selecting athletic shoes for teenage sons and daughters. Based on a scale of zero (of no importance) to 10 (most important), fit and how comfortable the child finds the shoe topped the list of considerations, followed by the mothers' own past experience with the shoe type, then by the look of the shoe.

The pattern in responses was similar for both girls' and boys' athletic shoes.

Importance To Mothers of Various Considerations In Selecting Athletic Shoes
Based on a Rating Scale of 0 - 10

	For Girls 13-17 Years			For Boys 13-17 Years		
	Average Score	% of Respondents Rating 8 - 10 (Very Impt.)	% of Respondents Rating 0 - 3 (Unimportant)	Average Score	% of Respondents Rating 8 - 10 (Very Impt.)	% of Respondents Rating 0 - 3 (Unimportant)
1. Fit/how comfortable the child finds it	9.56	96.6%	1.0%	9.77	95.9%	--
2. Own past experience	7.43	64.4	10.3	7.80	66.9	7.0%
3. The look (style, color)	7.42	62.1	6.8	7.68	61.0	4.1
4. The brand name	5.64	32.7	27.6	6.37	44.2	20.4
5. The stores' or salesmen's recommendation	4.27	16.6	39.6	4.82	24.4	23.2
6. A friend's recommendation	3.60	9.8	45.9	3.46	10.5	47.7
7. A sports personality's endorsement	2.36	8.0	71.8	2.27	6.4	70.4

A sports personality's endorsement generally rated least in importance among the seven factors mothers were asked to rate in buying athletic shoes for a teenage son or daughter.

In order of frequency of mentions, the top three outlet types named by mothers of teenage boys on where their athletic footwear (including sneakers) is usually purchased were department stores, sporting goods stores and shoe stores--each very close in the percent of respondents. Among mothers of teen girls, shoe stores were most frequently mentioned, followed by department stores and sporting goods stores.

There was considerable variation in the pattern of responses, however, based on household income as well as on the locations of stores where the teenagers' shoes are usually purchased.

BUYING HABITS--TEENS' FOOTWEAR

Sporting goods stores were favored for athletic shoe purchases for both boys and for girls by mothers in the more affluent households (income of $35,000 or more) and those shopping in suburban or neighborhood stores. Shoe stores were mentioned most frequently by mothers with incomes under $35,000 and by those usually buying teens' footwear in downtown business locations. Athletic footwear stores were strongest among respondents in households with incomes of $35,000 and over, and those who usually bought their child's shoes in a shopping center or mall.

Usual Place of Purchase of Athletic Footwear (Including Sneakers)
(Percent of Respondents)

	Household Income (000)				Usual Place of Purchase of Teenagers' Footwear		
	Total	Under $25	$25-34.9	$35 +	Downtown Bus. Sect.	Shopping Center/Mall	Suburbs/ Neighborhood
For girls 13-17, total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Shoe store	32.2	34.2	37.0	23.8	52.4	29.7	30.0
Department store	26.4	30.3	29.6	16.7	14.3	28.1	20.0
Sporting goods store	24.1	18.4	22.2	35.7	23.8	23.4	35.0
Athletic footwear store	13.2	10.5	9.3	23.8	4.8	16.4	10.0
Discount store	8.0	6.6	11.1	4.8	4.8	8.6	10.0
Mail order & other	2.3	3.9	1.9	--	--	1.6	--
For boys 13-17, total	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Department store	26.2	31.0	21.4	22.5	8.3	26.3	39.3
Sporting goods store	25.0	15.5	28.6	35.0	25.4	25.4	32.1
Shoe store	24.4	31.0	26.2	12.5	41.7	23.7	10.7
Athletic footwear store	15.7	14.3	16.7	20.0	12.5	18.6	7.1
Discount store	7.6	7.1	7.1	7.5	8.3	7.6	7.1
Mail order & other	4.1	2.4	7.2	5.0	8.3	0.8	10.7

Note: Columns may add to more than 100.0% due to multiple responses.

Mothers who do not usually buy their teens' athletic footwear in a discount store were asked if they usually pay a regular price or wait for sales or look for athletic footwear that is on sale.

Over half (54.6%) of the mothers of teen girls and 47.7% of the mothers of teen boys said they usally pay the regular price for athletic footwear. Those paying the regular price for girls' athletic shoes represented well over half of all respondents in each income group--rising to close to 60% among mothers in the $35,000-plus bracket.

Among mothers of teen boys, however, close to 55% of those in the under $25,000 income group reported that they usually wait for sales, or look for sale prices, when buying their athletic footwear.

BUYING HABITS--TEENS' FOOTWEAR

A survey was conducted by mail in September 1982 by Seventeen Magazine among teenagers currently attending high school or college to determine information on apparel and footwear purchases for fall/winter wardrobes.

Results were projected to a total of 8,655,000 teenage-female students in the U.S.

	Number Purchasing (000)	Pairs Purchased (000)	Expenditure (000)
Total girls buying any footwear	8,172	31,315	$ 1,004,756
Total buying shoes	8,019	27,358	769,504
Total buying boots	2,762	3,957	235,252
Types of footwear purchased:			
Casuals	6,315	8,056	227,594
Dress	5,089	6,260	198,167
Sandals/thongs	1,941	2,422	43,562
Clogs	797	837	23,570
Sneakers -- jogging	2,814	3,216	97,421
-- tennis	2,632	2,971	85,296
Wooden bottom (not clogs)	212	250	6,400
Formal evening	752	962	36,224
Moccasin-type shoes	1,487	1,730	43,554
Slippers	522	654	7,716
Boots	3,591	3,957	235,252

Source: Seventeen's Back-To-School Study, 1983

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (August)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

9/19/83 C3400-1.54 a

Men's Tailored Clothing, Separates and Rainwear

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Gregory Becker, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:

- GENERAL STATISTICS ON THE INDUSTRY................................ 2
  - EMPLOYMENT & EARNINGS.. 4
  - CONCENTRATION IN THE INDUSTRY...................................... 4
  - OPERATING RATIOS... 6
- PRODUCTION... 7
  - BY PRICE LINE.. 9
  - BY FABRIC/CONSTRUCTION...10
  - SEASONAL PATTERNS IN PRODUCTION....................................12
- SHIPMENTS..12
- PRODUCER PRICE TRENDS..14
- FOREIGN TRADE--IMPORTS...14
- FOREIGN TRADE--EXPORTS...18

AT THE RETAIL LEVEL:

- THE MARKET FOR MEN'S WEAR..20
  - POPULATION...20
  - EMPLOYMENT...21
- RETAIL SALES...21
  - BY PRODUCT...23
  - BY STORE TYPE..24
  - SEASONAL PATTERNS..27
- RETAIL ADVERTISING...27
- CONSUMER PRICE INDEX...28
- CONSUMER BUYING HABITS...28

SCHEDULE OF ADDITIONAL FACT FILES......................................32

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications
Division of Capital Cities Media, Inc.
All Rights Reserved.
Standard Book Number: 87005-461-9
Printed in the United States of America

MEN'S TAILORED CLOTHING, SEPARATES & RAINWEAR

Market Trends

After poor performances for several years, the men's tailored wear industry is finally showing signs of recovery as the fall 1983 season begins and the economy appears to be well on its way to recovery. Most industry analysts report that consumers, who had been holding off purchases of tailored wear due to the poor economy, are now returning to the market in droves.

Although sales for 1982 were generally off according to men's apparel retailers, not all segments of the tailored industry suffered equally. The men's suit segment registered extremely poor sales in the moderate and budget areas, but the upper-priced area registered respectable gains, according to industry insiders. The sport coats & separates areas also registered gains in 1982 due to the desire of consumers to update older wardrobes in an economical way.

Most manufacturers of tailored clothing see imports as the greatest difficulty facing the industry today. In 1982, imports of tailored wear increased by 12.2% on a unit basis and 14.7% on a dollar basis while exports were off by better than 30% on both these measures during this same period. The high value of the U.S. dollar is seen as one of the major causes for the foreign trade situation as well as the extreme labor intensiveness of the industry. As labor cost differences between domestic producers and developing countries continue to widen, analysts see the trend toward more imports from less expensive developing countries continuing. Another factor affecting the foreign trade situation, is the changing perception of consumers of foreign goods. Studies indicate that consumers are now perceiving most foreign produced goods as of equal or better quality than domestic goods and are less likely to run away from imports for this reason, particularly goods produced in France and Italy.

Designer labels are growing in the men's clothing industry. Trade sources estimate that they now cover about 20-25% of the total, and in higher priced tailored clothing, as much as 40% of the market. Designer-label clothing includes both imports and domestic merchandise. Manufacturers are seeking to broaden their retail distribution programs through the use of designer labels and licensing arrangements. Among specialty stores there is a growing tendency to emphasize the stores' private labels or very high priced designer lines.

One bright spot for the tailored wear industry is the demographics associated with this market. The number of males between 35 and 54, the group most likely to purchase tailored wear, is expected to increase by 58% between 1983 and 2000. Along with this increase is a traditional increase in the number of males employed in white collar jobs. Between December 1981 and 1982, when the latest recession was at its peak, the number of males employed in white collar jobs increased 1.3% reaching a total of 24.5 million. By contrast, the number of blue collar males fell 5.2% to 21.5 million during this same period.

The traditionally stagnant rainwear industry is currently enjoying a banner year in 1982 due to the severe weather conditions which ravaged the country in the winter and spring of this year. Most retailers reported sales increases of better than 20% for the rainwear categories in the spring, with many reporting that retailers are placing large orders for the fall season due to low inventory levels created by the spring rush on the category.

AT THE MANUFACTURER LEVEL

GENERAL STATISTICS ON THE INDUSTRY

The U.S. Bureau of the Census conducts a complete census of U.S. manufacturers every five years, the latest covering the year 1977. Between censuses, the Bureau conducts annual surveys among a representative sample of manufacturers which are the basis for estimates on key measures of manufacturing activity for industry groups and important industries. These estimates provide a continuous series of basic industry statistics. Results from the most recent annual survey covering the year 1981 are summarized in the tables below.

In addition to the annual surveys, the Bureau of Industrial Economics reports on manufacturing activity in the 1983 Industrial Outlook. This source estimates that in 1982, manufacturers' shipments of men's and boys' suits and coats reached $3.2 billion, while shipments in the men's & boys' trousers area were estimated at about $2.3 billion in that same year.

Men's & Boys' Suits & Coats (SIC 2311*)

	1981	1980	1977	% Change 1981/1980
Number of companies	na	na	721	--
Number of establishments**	na	582	856	--
Payroll (mil. $)	$ 878.6	$ 833.5	$ 770.3	+ 5.4%
Value added by manufacture# (mil. $)	$1,631.2	$1,567.0	$1,342.2	+ 4.1
Value of shipments ## (mil. $)	$3,024.2	$2,807.0	$2,396.9	+ 7.7
Capital expenditures, new (mil. $)	$ 35.9	$ 29.8	$ 22.5	+ 20.5

Men's & Boys' Separate Trousers (SIC 2327*)

	1981	1980	1977	% Change 1981/1980
Number of companies	na	na	463	--
Number of establishments**	na	na	624	--
Payroll (mil. $)	$ 543.8	$ 528.1	$ 439.3	+ 3.0%
Value added by manufacture # (mil. $)	$1,132.3	$1,102.0	$ 784.9	+ 2.7
Value of shipments ## (mil. $)	$2,152.1	$2,006.6	$1,745.0	+ 7.3
Capital expenditures, new (mil. $)	$ 22.5	$ 20.5	$ 22.2	+ 9.8

Waterproof Outer Garments (SIC 2385*)

	1981	1980	1977	% Change 1981/1980
Number of companies	na	na	236	--
Number of establishments**	na	125	257	--
Payroll (mil. $)	$ 68.3	$ 102.3	$ 86.4	- 33.3%
Value added by manufacture # (mil. $)	$ 188.1	$ 216.7	$ 168.8	- 13.2
Value of shipments ## (mil. $)	$ 377.5	$ 376.5	$ 332.1	+ 0.3
Capital expenditures, new (mil. $)	$ 4.1	$ 3.6	$ 2.4	+ 13.9

(footnotes continued)

GENERAL STATISTICS ON THE INDUSTRY

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification system (SIC) determined by the principal product made, as shown below:

SIC 2311 comprises establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sport coats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

SIC 2327 comprises establishments primarily engaged in manufacturing men's, youth's and boys' separate slacks and trousers.

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). The total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered on page 13 for the latest years available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Annual Survey of Manufactures, 1980, 1981.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Employment in both measured sections of the men's and boys' tailored wear industry continued to decline through 1982 and into 1983, according to data from the U.S. Bureau of Labor Statistics. The total number of employees in the men's and boys' suit and coat segment fell 3.0% in 1982 to 74,200 workers, while those manufacturers of separate trousers registered an even larger decline of 5.3% to 67,700 employees.

During the first quarter in 1983 the decline in the number of employees in the tailored wear industry accelerated. The suit and jacket group measuring a 10.7% decline from the totals of a year earlier and the separate trouser group dropped 4.6%.

Employment & Earnings of Selected Men's & Boys' Tailored Wear Industries

	January-March Average			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Men's & boys' suits & coats:						
All employees (thous.)	68.6	76.8	- 10.7%	74.8	76.7	- 2.5%
Production workers (thous.)	60.1	67.0	- 10.3	65.4	67.1	- 2.5
Average weekly earnings	$207.41	$204.08	+ 1.6	$209.75	$207.64	+ 1.0
Average weekly hours	33.8	33.5	+ 0.9	34.9	36.3	- 3.9
Average overtime hours	0.4	0.9	- 55.6	0.7	0.7	--
Men's & boys' separate trousers:						
All employees (thous.)	66.4	69.6	- 4.6	65.8	70.9	- 7.2
Production workers (thous.)	57.4	59.3	- 3.2	57.2	61.9	- 7.6
Average weekly earnings	$181.28	$161.04	+ 12.6	$169.27	$168.59	+ 0.4
Average weekly hours	36.1	33.0	+ 9.4	34.9	36.1	- 3.3
Average overtime hours	1.1	0.6	+ 83.3	1.0	0.9	+ 11.1

Source: U.S. Bureau of Labor Statistics, Employment and Earnings.

Concentration in the Industry

Employment in the men's tailored clothing industry is highly concentrated in larger plants, according to data from the U.S. Bureau of the Census. In 1980, only 18.5% of all plants manufacturing men's and boys' suits and coats had more than 250 employees, yet these plants accounted for almost two-thirds of the employees in the industry in that year. Likewise, in the separate trousers segment, large plants represented 22.4% of the total establishments and employed 60.8% of the group's work force.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

The waterproof outer garment segment appears to be only slightly less concentrated than the previous mentioned segments. Data for 1980 on employment by establishment size is not completely available for 1980, but the 1977 census of manufacturers indicated that establishments with 250 or more employees represented 6.0% of all plants and 38.3% of employees.

The Men's Tailored Apparel Industry by Employment Size, 1980

	Establishments		Employees	
	Number	% of Total	Number	% of Total
Men's & boys' suits & coats, total	582	100.0%	87,726	100.0%
By establishment size:				
Under 10 employees	136	23.4	655	0.7
10 - 49 employees	142	24.4	3,813	4.3
50 - 249 employees	196	33.7	26,538	30.3
250 or more employees	108	18.5	56,720	64.7
Separate trousers, total	393	100.0%	69,052	100.0%
By establishment size:				
Under 10 employees	74	18.8	348	0.5
10 - 49 employees	78	19.8	2,279	3.3
50 - 249 employees	153	38.9	21,464	31.1
250 or more employees	88	22.4	41,961	60.8
Waterproof outer garments, total	125	100.0%	10,324	100.0%
By establishment size:				
Under 10 employees	32	25.6	(D)	na
10 - 49 employees	42	33.6	1,219	11.8
50 - 249 employees	38	30.4	4,294	41.6
250 or more employees	13	10.4	(D)	na

Source: U.S. Bureau of the Census, County Business Patterns, 1980, (CBP-80-1).

The latest government data on concentration of shipments in the men's & boys' tailored clothing and rainwear industries comes from the 1977 Census of Manufactures, published by the U.S. Bureau of the Census. The Bureau reported that in 1977 the four largest manufacturers of men's and boys' suits accounted for 21% of the industries total shipments. In the men's and boys' separate trousers segment, the four largest manufacturers represented 25% of total shipments, while in rainwear the same number of producers accounted for a whopping 41% of the industries total shipments.

GENERAL STATISTICS ON THE INDUSTRY

Concentration in the Industry

Concentration Ratios in the Men's Tailored Wear Industry, 1977

	Value of Industry Shipments (Mil. $)	Percent accounted for by: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Men's & boys' suits & coats (SIC 2311*)	$2,767.5	21%	32%	48%	67%
Men's & boys' separate trousers (SIC 2327*)	$1,718.0	25	40	59	77
Waterproof outer garments (SIC 2385*)	$ 348.8	41	52	70	90

* = For definitions of SIC codes see page 3.

Source: U.S. Bureau of the Census,
Census of Manufacturers, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

Employment & Share of Shipments in Large Plants in the Men's Tailored Apparel Industry, 1981

	Number of Plants With 20+ Employees	With 100+ Employees	% of industry shipments accounted for by plants with 100 or more employees
Men's & boys' suits & coats (SIC 2311*)	437	262	91%
Men's & boys' separate trousers (SIC 2327*)	376	287	94%
Waterpoof outer garments (SIC 2385*)	96	38	100%

* = For definition of SIC codes see page 3.

Source: Sales and Marketing Management
"Survey of Industrial Buying Power"
April, 1982
All Rights Reserved

Operating Ratios

The following financial data were compiled by the Federal Trade Commission, in its Annual Line of Business Report, released May 1982.

GENERAL STATISTICS ON THE INDUSTRY

Operating Ratios

Operating Results of Men's & Boys' Suit & Coat Producers, 1976

	Men's & Boys' Suits & Coats
Operating income to assets	10.3%
Operating income to sales	5.6
Media advertising expense to sales	1.0
Total selling expense to sales	7.0
Total assets to sales	54.6

Source: Federal Trade Commission,
Bureau of Economics,
Annual Line of Business Report, 1976.

PRODUCTION

The latest official government data concerning domestic production of men's tailored clothing and rainwear is contained in the Current Industrial Reports series, published by the U.S. Bureau of the Census, covering the years 1981 and 1982. The bureau reported that between 1981 and 1982, unit production of men's tailored wear was off by 7.0% falling to 144,757,000 units.

No major category of tailored wear registered an increase in production during the measured period although two groups of uniform type tailored wear did record gains (sport coats & jackets and overcoats). The largest decline in the time frame was in the separate vests, excluding sweater vests group whose cuttings declined by 31.9% falling to 2.2 million units.

Production of Men's Tailored Clothing & Rainwear, 1981, 1982
(Thousands of Units)

	1982	1981	% Change 1982/1981
Tailored clothing	144,757	151,707	- 4.6%
Tailored suits, incl. uniforms	11,735	13,922	- 15.7
Trios	439	609	- 27.9
Uniform suits	242	298	- 18.8
Overcoats, topcoats & tailored suburban & car coats, incl. uniform	2,590	3,193	- 18.9
Uniform coats	307	290	+ 5.9

(continued)

PRODUCTION

Production of Men's Tailored Clothing & Rainwear, 1981, 1982
(Thousands of Units)
(continued)

	1982	1981	% Change 1982/1981
Tailored suit-type dress & sport coats, incl. uniform	16,477	17,140	- 3.9%
Uniform coats & jackets	1,475	1,444	+ 2.1
Separate vests, exc. sweater vests	2,206	3,237	- 31.9
Separate dress & sport trousers, incl. uniform	111,749	118,215	- 5.5
Uniform	5,934	6,281	- 5.5
Men's & boys' raincoats, incl. uniform	2,980	3,280	- 9.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(82)-1.

Explanation of terms:

Tailored uniform suits
Includes military, guards, band, police, fire, etc. Nontailored work-type suits, such as delivery drivers and gas station attendants are included in other categories.

Trios
Includes tailored suits with a matching and contrasting pair of pants.

Overcoats, topcoats & tailored suburban, car & stormcoats
Includes only tailored items including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats, excludes raincoats.

Raincoats
Includes waterproof outercoats and water-repellent coats of cotton and man-made fibers including uniforms.

Separate vests including uniform
Includes vests not part of suits, excludes sweater vests.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1

PRODUCTION

By Price Line

Although the production of tailored wear was off in 1982 as noted in the previous table, not all price lines suffered declines during the period. Upper priced categories consistently registered increases in production between 1981 and 1982. Suits with wholesale prices of over $150.00 registered an increase of 72.8%, while dress & sport coats of $62.50 and above were up 13.4% and dress trousers factory priced over $12.50 marked an increase of 5.5%.

Most analysts concur that the recession of 1981/82 was the reason for the growth of better priced tailored clothing. The economic downturn had a much greater effect on lower income groups and thus lower priced apparel suffered while production of more expensive groups remained strong.

Production of Men's Tailored Wear by Factory (Wholesale)
Price Line, 1981, 1982
(Thousands of Units)

	1982	1981	% Change 1982/1981	Percent of total 1982
Tailored suits, including uniforms	11,735	13,922	- 15.7%	100.0%
Under $50.00	784	3,042	- 74.2	6.7
$50.00 - $62.49	1,739	2,932	- 40.7	14.8
$62.50 - $99.99	4,348	3,846	+ 13.1	37.0
$100.00 - $149.99	2,353	2,876	- 18.2	20.1
$150.00 & over	2,084	1,206	+ 72.8	17.8
Price line unspecified	427	1,020	- 58.1	3.6
Suit-type dress & sports coats	16,477	17,140	- 3.9	100.0
Under $24.00	919	1,247	- 26.3	5.5
$24.00 - $37.49	4,942	5,356	- 7.7	30.0
$37.50 - $44.99	3,091	3,050	+ 1.3	18.8
$45.00 - $57.49	1,770	2,055	- 13.9	10.7
$57.50 - $62.49	680	616	+ 10.4	4.1
$62.50 & over	4,513	3,982	+ 13.3	27.4
Price line unspecified	562	834	- 32.6	3.5
Dress & sport trousers	111,749	118,215	- 5.5	100.0
Under $4.25	920	718	+ 28.1	0.8
$4.25 - $5.00	1,036	742	+ 39.6	0.9
$5.00 - $8.99	23,604	31,078	- 24.0	21.1
$9.00 - $12.49	47,963	45,126	+ 6.3	42.9
$12.50 & over	37,828	35,839	+ 5.5	33.9
Price line unspecified	398	4,712	- 91.6	3.6

NOTE: Production of rainwear by price line was not reported by the Census Bureau for 1981 or 1982.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(82)-1

PRODUCTION

By Fabric/Construction

The distribution of 1981 and 1982 cuttings of men's tailored clothing by type of fabric and construction, based on manufacturers reporting to the Census Bureau, is covered in the following table.

Production of Reported Types of Men's Tailored Wear
By Fabric & Construction, 1981, 1982

	1982	1981	% Change 1982/1981	Percent of total 1982
Tailored suits, including uniforms	11,735	13,927	- 15.7%	100.0%
By fabric:				
Woven:				
All cotton & chiefly cotton	159	440	- 63.9	1.3
Man-made/wool blends, chiefly man-made	3,867	4,579	- 15.5	33.0
All man-made & chiefly man-made, except man-made/wool blends	3,058	4,179	- 26.8	26.1
All wool & chiefly wool	3,475	3,252	+ 6.9	29.6
All other woven fabrics	236	321	- 26.5	2.0
Knit:				
All cotton & chiefly cotton	--	--	--	--
All man-made & chiefly man-made	548	596	- 8.1	4.7
All other knit fabrics	392	556	- 29.5	3.3
Overcoats, topcoats & tailored suburban & car coats, including uniform	2,590	3,193	- 18.9	100.0
By fabric:				
All man-made & chiefly man-made	1,025	1,526	- 32.8	39.6
All wool & chiefly wool	755	748	+ 0.9	29.2
All other fabric	810	928	- 12.7	31.2
By construction:				
Woven	2,312	2,906	- 20.4	89.3
Knit Construction unspecified	278	287	- 3.1	10.7
Men's & boys' raincoats, incl. uniform	2,980	3,280	- 9.1	100.0
By fabric:				
Plastic Rubberized &/or coated fabric	1,588	1,688	- 5.9	53.3
Uncoated fabric:				
All cotton & chiefly cotton	29	90	- 67.8	1.0
All man-made & chiefly man-made	1,083	1,318	- 17.8	36.3
All other uncoated fabric	159	133	+ 19.5	5.3
All other fabric	121	51	+137.3	4.1

(continued)

PRODUCTION

By Fabric/Construction

Production of Reported Types of Men's Tailored Wear By Fabric & Construction, 1981, 1982 (continued)

	1982	1981	% Change 1982/1981	Percent of total 1982
Tailored suit-type dress & sport coats	16,477	17,140	- 3.9%	100.0%
By fabric:				
Woven				
All cotton & chiefly cotton	756	417	+ 81.3	4.6
Man-made/wool blends, chiefly man-made	4,083	2,819	+ 44.8	24.8
All man-made & chiefly man-made, except man-made wool/blends	5,706	6,528	- 12.6	34.5
All wool & chiefly wool	4,130	4,594	- 10.1	25.1
All other woven fabric	476	586	- 18.8	2.9
Knit fabric:				
All cotton & chiefly cotton	--	--	--	--
All man-made & chiefly man-made	370	725	- 49.0	2.3
Fabric unspecified	956	1,471	- 35.0	5.8
Separate vests, excluding sweater vests	2,206	3,237	- 31.9	100.0
By fabric:				
All cotton & chiefly cotton	164	315	- 47.9	7.4
All man-made & chiefly man-made	1,331	2,204	- 39.6	60.3
All wool & chiefly wool	84	115	- 27.0	3.9
All other fabric	108	156	- 30.8	4.9
Fabric unspecified	519	447	+ 16.1	23.5
By construction:				
Woven	1,972	3,045	- 35.2	89.4
Knit Construction unspecified	234	192	+ 21.9	10.6
Separate dress & sport trousers, including uniform	111,749	118,215	- 5.5	100.0
By fabric:				
Woven:				
All cotton & chiefly cotton	13,772	12,283	+ 12.1	12.3
Man-made/wool blends, chiefly man-made	11,745	9,052	+ 29.8	10.5
All man-made & chiefly man-made, except man-made/wool blends	64,125	72,772	- 11.9	57.4
All wool & chiefly wool	6,548	6,431	+ 1.8	5.9
All other fabrics	6,482	6,049	+ 7.2	5.8
Knit fabric:				
All man-made & chiefly man-made	7,645	7,689	- 0.6	6.8
Fabric unspecified	1,396	3,939	- 64.6	1.3

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(82)-1

PRODUCTION

Seasonal Patterns in Production

The table below shows the 1980 and 1981 distribution by months in specified types of tailored wear, as reported in the Current Industrial Reports. Data on cuttings by month for 1982 are not available.

Men's Tailored Wear
Percent of Years Cuttings by Month, 1980, 1981

	Suits		Overcoats & topcoats		Sport & dress coats		Trousers	
	1981	1980	1981	1980	1981	1980	1981	1980
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	11.3	8.8	6.2	7.0	7.8	6.5	7.1	7.9
February	6.7	8.4	7.6	7.4	8.6	7.0	7.4	8.1
March	8.3	8.2	8.6	9.0	8.3	7.9	8.4	9.1
April	8.4	9.2	8.7	8.4	8.9	9.7	8.8	8.9
May	9.0	8.7	8.3	11.0	8.1	9.1	9.0	8.4
June	9.1	7.7	7.9	10.8	8.8	9.7	8.6	8.2
July	6.0	5.8	8.1	6.8	6.6	6.8	6.3	5.2
August	8.2	8.3	10.0	8.0	8.1	7.9	9.3	9.3
September	8.5	8.7	10.2	8.1	10.1	9.7	9.2	9.3
October	9.0	10.1	9.9	8.9	9.4	10.1	9.3	10.3
November	8.0	8.5	7.4	8.3	8.0	8.4	8.6	8.7
December	7.5	7.6	7.1	6.3	7.3	7.2	8.0	6.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E (81)-1
(December 1982)

SHIPMENTS

The Census Bureau reported in the Current Industrial Report on men's & boys' outerwear that shipments of men's tailored clothing was $3.7 billion in 1982, 1.3% less than the total measured in the previous year.

Two of the six measured categories of tailored wear and rainwear recorded increases in the value of their shipments between 1981 and 1982. While rainwear recorded a 4.8% increase to $116.6 million, the largest category, separate dress and sport trousers had a 2.6% gain reaching $1,413.8 million in shipments.

The largest decline in value of shipments was recorded by the separate vests group, off by 28.9% followed by overcoats and topcoats (-12.9%).

SHIPMENTS

Value of Shipments of Reported Men's Tailored Wear Categories, 1981, 1982
(Millions of Dollars)

	1982	1981	% Change 1982/1981
Total, all reported tailored wear	$3,655.9	$3,702.8	- 1.3%
Tailored suits, including uniform	1,103.5	1,144.4	- 3.6
Overcoats, topcoats & tailored suburban & car coats, including uniform	121.8	139.9	- 12.9
Men's & boys' raincoats, incl. uniform	116.6	111.3	+ 4.8
Tailored suit-type dress & sport coats, including uniforms	873.2	891.1	- 2.0
Separate dress & sport trousers, including uniform	1,413.8	1,378.1	+ 2.6
Separate vests, excluding sweater vests	27.0	38.0	- 28.9

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(82)-1

The most comprehensive figures on shipments (including both primary producers and manufacturers classified in other industries) are covered in the complete census of manufactures, compiled by the Census Bureau at five year intervals, in years ending in "2" and "7". In interim years, the Census Bureau issues reports in an annual survey of manufactures which is based on a sample of manufacturing firms and adjusted for comparability with the complete census. The results of the latest annual survey are summarized below.

The Census Bureau reports that between 1980 and 1981, the value of shipments of men's tailored wear increased 5.9% reaching a total of $2.7 billion. The fastest growing category during this period was men's dress & sport coats and jackets, in which value of shipments rose 14.8%.

Tailored Wear & Rainwear Shipments by All Producers 1979-1981

	1981	1980	1979	% Change 1981/1980	% Change 1981/1979
Tailored wear, total	$ 2,706.3	$ 2,555.4	$ 2,515.1	+ 5.9%	- 7.6%
Men's suits	1,142.1	1,113.2	1,174.6	+ 2.6	- 2.8
Men's overcoats & topcoats	138.1	143.3	147.5	- 3.6	- 6.3
Men's tailored dress & sport coats & jackets	885.9	771.6	660.6	+ 14.8	+ 34.1
Commission work on men's & boys' suits & coats	455.3	442.5	485.8	+ 2.9	- 6.3
Men's & boys' suits, coats & overcoats, nsk	84.9	84.8	46.6	+ 0.1	+ 82.2
Separate trousers, total	1,990.5	1,838.2	1,792.7	+ 8.3	+ 11.0
Men's & boys' separate dress & sport trousers	1,584.5	1,442.6	1,433.8	+ 9.8	+ 10.5
Contract work on men's & boys' separate trousers	378.9	370.2	370.2	+ 2.4	+ 2.4
Separate trousers, nsk	27.0	25.4	25.5	+ 6.3	+ 5.9
Waterproof outer garments, total	435.7	447.4	383.6	- 2.6	+ 13.6
Commission work on waterproof outer garments	41.7	47.1	54.8	- 11.5	- 23.9
Raincoats & other waterproof outer garments	412.0	400.3	328.8	+ 2.9	+ 25.3

nsk = not specified by kind

Source: U.S. Bureau of the Census
Annual Survey of Manufactures, 1981.

PRODUCER PRICES

Producer Price Indexes for Selected Types of Men's Tailored Wear
(12/80 = 100, unless otherwise noted)

	April 1983	April 1982	% Change 1983/1982
All commodities (1967 = 100)	300.8	298.0	+ 0.9%
Apparel less footwear (1967 = 100)	194.7	194.1	+ 0.3
Menswear (12/77 = 100)	221.1	219.2	+ 0.9
Business-type sport coats of cotton or cotton blends	110.6	106.2	+ 4.1
Business-type sport coats of other fabrics	109.7	106.5	+ 3.0
Regular weight suits of cotton or cotton blends	114.1	111.7	+ 2.1
Lt. weight suits of other fabrics	112.0	107.7	+ 4.0
Trousers, exc. uniform of cotton or cotton blend (12/81 = 100)	101.2	103.2	- 1.9
Trousers, exc. uniform of wool or wool blends (12/81 = 100)	103.5	100.8	+ 2.7
Trousers, exc. uniform of other fabrics (12/81 = 100)	112.0	107.7	+ 4.0

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

According to the U.S. Bureau of Industrial Economics (1983 Industrial Outlook), U.S. imports of men's & boys' suits and coats accounted for 21.7% of apparent consumption in 1982. Imports represented 22.8% of apparent consumption of separate trousers.

Imports of men's & boys' tailored clothing and rainwear surpassed the $1 billion level in 1982, rising 14.7% to $1,084.0 billion in that year. When measured on a quantity basis, imports again showed a rise between 1981 and 1982, climbing 12.2% to almost 12 million dozen.

Only two categories of imports in the tailored clothing area registered declines between 1981 and 1982 according to the U.S. Bureau of the Census. Man-made trousers and rainwear measured declines of 10.4% and 10.8%, respectively, on a C.I.F. dollar basis and 7.8% and 15.3%, respectively, on a unit basis.

The fastest growing category of imports in 1982 was man-made coats, except suit-type made of man-made fibers. This skyrocketed 50.5% to $268.5 million in value in 1982, while on a unit basis, this one group was up 40.7%, to 2.4 million dozen.

FOREIGN TRADE

Imports

A substantial portion of imported apparel originates with domestic manufacturers who produce part of their production abroad, but in much of the tailored clothing industry, union contracts prevent domestic manufacturers from doing this.

Due to the fact that the apparel manufacturing industry is extremely labor intensive, analysts see a continuing trend toward the manufacture of apparel items in off-shore, low cost developing countries. Although import penetration in the men's tailored wear industry is lower than that in other apparel areas, the rate has been rising over the last several years and most domestic producers see themselves as particularly vulnerable to imports.

Another factor affecting the quantity of imports is the increasing perception of consumers that foreign produced goods are of equal or better quality than domestic produced goods. As this perception grows, domestic manufacturers are forced into a more competitive situation, especially from foreign designers in France and Italy.

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1982, 1981

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Total, reported categories	11,977.8	10,675.9	+ 12.2%	$1,084.0	$ 944.9	+ 14.7%
Suits, total	232.4	209.9	+ 10.7	123.3	109.3	+ 12.8
Wool	127.1	115.4	+ 10.1	89.1	82.7	+ 7.7
Man-made	105.3	94.5	+ 11.4	34.2	26.7	+ 28.1
Suit-type sport coats & jackets, total	399.4	350.9	+ 13.8	96.0	86.8	+ 10.6
Wool	75.5	65.5	+ 15.3	33.2	31.3	+ 6.1
Cotton	208.6	175.9	+ 18.6	40.2	33.8	+ 18.9
Man-made	115.3	109.5	+ 5.3	22.6	21.7	+ 4.1
Trousers**, total	8,056.1	7,568.1	+ 6.4	482.1	476.6	+ 1.2
Wool	235.0	170.3	+ 38.0	40.0	33.0	+ 21.2
Cotton	4,808.7	5,217.1	- 7.8	309.4	345.2	- 10.4
Man-made	3,012.4	2,180.7	+ 38.1	132.7	98.4	+ 34.9
Coats, excl. suit-type, total	3,268.9	2,522.2	+ 29.6	374.3	262.9	+ 42.4
Wool	28.0	21.1	+ 32.7	12.8	10.9	+ 17.4
Cotton	823.9	783.0	+ 5.2	93.0	73.6	+ 26.4
Man-made	2,417.0	1,718.1	+ 40.7	268.5	178.4	+ 50.5
Raincoats	21.0	24.8	- 15.3	8.3	9.3	- 10.8

(footnotes continued)

FOREIGN TRADE

Imports

*The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

**This category also includes slacks and shorts made from these fibers.

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT135, December 1981, 1982

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1981, 1982

	Quantity (Thous. of Doz.)		% Change	Value C.I.F.* (Thous. of $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Suits, wool, total	127.1	115.4	+ 10.1%	$ 89.1	$ 82.7	+ 7.7%
Korea	28.6	30.5	- 6.2	18.2	18.4	- 1.1
France	15.7	18.6	- 15.6	11.9	13.4	- 11.2
Mainland China	14.7	6.3	+133.3	6.0	1.9	+215.8
Suits, man-made, total	105.3	94.5	+ 11.4	34.2	26.7	+ 28.1
Korea	53.3	49.2	+ 8.3	21.7	17.1	+ 26.9
Taiwan	25.3	21.7	+ 16.6	4.9	3.7	+ 32.4
Romania	14.7	5.9	+149.2	4.0	1.5	+166.7
Suit-type sports coats & jackets, wool, total	75.5	65.5	+ 15.3	33.2	31.3	+ 6.1
Korea	12.9	14.6	- 11.6	5.7	6.0	+ 5.0
Poland	7.7	8.6	- 10.5	1.9	1.9	--
Italy	7.5	5.9	+ 27.1	8.0	7.4	+ 8.1
Suit-type sports coats & jackets, cotton, total	208.6	175.9	+ 18.6	40.2	33.8	+ 18.9
Mainland China	39.8	22.8	+ 74.6	5.9	3.0	+ 96.6
Poland	35.3	44.4	- 20.5	6.8	8.4	- 19.0
Hong Kong	35.3	29.8	+ 18.5	5.7	4.9	+ 16.3
Suit-type sports coats & jackets, man-made, total	115.3	109.5	+ 5.3	22.6	21.7	+ 4.1
Korea	37.8	23.6	+ 60.2	8.4	5.7	+ 47.4
Columbia	35.1	40.1	- 12.5	6.8	7.4	- 8.1
Philippines	6.5	12.2	- 46.7	1.1	2.2	- 50.0

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear by Leading Countries of Origin, 1981, 1982
(continued)

	Quantity (Thous. of Doz.)		% Change	Value C.I.F.* (Thous. of $)		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Trousers, wool, total#	235.0	170.3	+ 38.0%	$ 40.0	$ 33.0	+ 21.2%
Mainland China	75.1	19.5	+285.1	8.3	2.1	+295.2
Korea	65.3	58.0	+ 12.6	10.7	8.5	+ 25.9
Italy	31.8	32.7	- 2.8	9.9	11.3	+ 12.4
Trousers, cotton, total	4,808.7	5,217.1	- 7.8	309.4	345.2	- 10.4
Hong Kong	1,923.7	2,043.8	- 5.9	146.5	163.8	- 10.6
Mainland China	575.5	794.4	- 27.6	29.3	33.6	- 12.8
Taiwan	346.8	227.4	+ 52.5	21.8	15.0	+ 45.3
Trousers, man-made, total	3,012.4	2,180.7	+ 38.1	132.7	98.4	+ 34.9
Taiwan	1,726.2	1,316.3	+ 31.1	71.2	54.2	+ 31.4
Mainland China	580.9	152.4	+281.2	21.4	6.4	+234.4
Hong Kong	198.8	141.6	+ 40.4	11.9	8.0	+ 48.8
Coats, excl. suit-type, wool, total	28.0	21.1	+ 32.7	12.8	10.9	+ 17.4
Hungary	5.1	1.4	+264.3	1.7	0.5	+240.0
Hong Kong	4.6	2.7	+ 70.4	1.4	0.8	+ 75.0
Yugoslavia	3.6	2.7	+ 33.3	2.5	1.7	+ 47.0
Coats, excl. suit-type, cotton, total	823.9	783.0	+ 5.2	93.0	73.6	+ 26.4
Hong Kong	163.4	150.6	+ 8.5	28.4	22.7	+ 25.1
Mainland China	156.0	154.6	+ 0.9	12.3	10.1	+ 21.8
Sri Lanka	126.4	131.4	- 3.8	8.8	8.6	+ 2.3
Coats, excl. suit-type, man-made, total	2,417.0	1,718.1	+ 40.7	268.5	178.4	+ 50.5
Korea	709.4	724.7	- 2.1	94.6	82.4	+ 14.8
Taiwan	587.0	396.0	+ 48.2	72.9	42.0	+ 73.6
Mainland China	331.6	56.7	+484.8	27.1	4.0	+577.5
Raincoats, total	21.0	24.8	- 15.3	8.3	9.3	- 10.8
Poland	6.3	8.5	- 25.9	2.3	2.9	- 20.7
Hong Kong	4.1	2.0	+105.0	1.1	0.6	+ 83.3
Taiwan	2.6	0.2	+1,200.0	0.8	0.1	+700.0

(footnotes on following page)

FOREIGN TRADE

Imports

*The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

#This category also includes slacks and shorts made from these fibers.

nr = not reported
na = not available

Source: U.S. Bureau of the Census,
U.S. General Imports,
Report FT 135, December 1981, 1982

Exports

The U.S. Bureau of Industrial Economics reports that U.S. exports of men's & boys' suits accounted for 1.9% of domestic shipments in 1982, down significantly from the 2.7% reported in the previous year. In the men's & boys' separate trousers area exports as a percent of shipments remained relatively stable, measuring 2.7% in 1981 and 2.8% in 1982.

Total exports of men's & boys' tailored clothing and rainwear were off by about one-third in 1982 on both a unit and dollar measure. Exports in 1982 fell to $71.7 million vs. $112.5 million in 1981 on a value basis while units declined from 2.9 million dozen to 1.9 million dozen during this same period.

The largest decline in dollars in 1982 was registered in wool suit-type sport coats and jackets (not knit) which declined 61.6% during the one-year period. On a unit basis the largest decline was recorded in man-made trousers and slacks, off 68.6%.

Industry analysts agree that the large decline in U.S. exports was due primarily to a strong U.S. dollar and to a worldwide recession. This combination caused U.S. manufactured goods to lose much of their foreign market share. The dollar continues strong and economic recovery abroad is lagging behind that in the U.S.

FOREIGN TRADE

Exports

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1981, 1982

	Quantity (Thous. of Doz.) 1982	Quantity (Thous. of Doz.) 1981	% Change 1982/1981	Value (F.A.S.)* (Thous. of $) 1982	Value (F.A.S.)* (Thous. of $) 1981	% Change 1982/1981
Total, all reported categories	1,946.3	2,897.4	- 32.8%	$71,710	$112,537	- 36.3%
Wool	31.2	47.1	- 33.8	4,940	4,914	+ 0.5
Cotton	908.1	1,051.7	- 13.7	29,850	44,300	- 32.6
Man-made	1,007.0	1,798.6	- 44.0	36,920	63,323	- 41.7
Suits, total	27.4	44.3	- 38.1	3,524	3,780	- 6.8
Knit:						
Cotton	5.4	9.4	- 42.6	606	666	- 9.0
Man-made	13.8	9.5	+ 45.3	1,742	755	+130.7
Not knit:						
Wool	0.3	0.8	- 62.5	181	127	+ 42.5
Cotton	2.2	7.5	- 70.7	220	749	- 70.6
Man-made	5.7	17.1	- 66.7	775	1,483	- 47.7
Suit-type sport coats & jackets, total	208.3	296.8	- 29.8	10,069	14,561	- 30.8
Knit:						
Cotton	25.5	56.8	- 55.1	918	2,249	- 59.2
Man-made	104.8	156.2	- 32.9	3,412	5,162	- 33.9
Not knit:						
Wool	7.8	5.5	+ 41.8	2,293	1,239	- 85.1
Cotton	6.2	17.2	- 64.0	705	1,835	- 61.6
Man-made	64.0	61.1	+ 4.7	2,741	4,076	- 32.8
Trousers & slacks, total	1,227.3	1,569.6	- 21.8	35,923	55,563	- 35.3
Knit:						
Cotton	119.1	141.8	- 16.0	5,312	5,518	- 3.7
Man-made	55.0	174.9	- 68.6	2,296	5,058	- 54.6
Not knit:						
Wool	9.9	15.1	- 34.4	448	989	- 54.7
Cotton	642.7	653.3	- 1.6	17,275	23,925	- 27.8
Man-made	400.6	584.5	- 31.5	10,592	20,073	- 47.2
Coats & jackets, excl. suit-type, incl. rainwear, total	473.7	973.7	- 51.4	21,090	37,155	- 43.2
Knit:						
Cotton	89.6	132.0	- 32.1	2,660	5,346	- 50.2
Man-made	104.8	156.2	- 32.9	3,412	5,162	- 33.9
Not knit:						
Wool	3.6	12.7	- 71.7	914	1,081	- 15.4
Cotton	17.4	33.7	- 48.4	2,154	4,012	- 46.3
Man-made	258.3	639.1	- 59.6	11,950	21,554	- 44.6
Wool suits, coats, raincoats, jackets, trousers & shirts--knit, total	9.6	13.0	- 26.2	1,104	1,478	- 25.3

(footnotes on following page)

FOREIGN TRADE

Exports

*The value is generally equivalent to a F.A.S. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports-Schedule E
Commodity by Country FT410,
December 1981, 1982.

AT THE RETAIL LEVEL

THE MARKET FOR MEN'S WEAR

Male Population

The two age groups which will increase most between 1983 and 1990 are those aged 35 - 54 and persons aged 55 and over, according to current Census Bureau projections. While the number of males aged 16 and over is expected to grow 16.3% to approximately 121 million, men aged 35 - 54 will rise 58.1% while the number over 55 will be up 17%.

Demographic trends, in general, favor the tailored wear industry. A sizable portion of the post-war baby boom will be moving into higher earnings brackets and buying more goods. The typical household is becoming smaller, older and more affluent, with a large share having two or more incomes.

The Male Population of the U.S., 1983 & Projections to 2000*

	Number (thousands)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
Total all ages	113,977	121,498	130,379	+ 14.4%	100.0%	100.0%	100.0%
Under 16 years	28,180	29,591	30,592	+ 8.6	24.7	24.4	23.5
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16 - 19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20 - 34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35 - 54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

*Middle series (out of three) projections based on varying assumptions on fertility, mortality and emigration.

Source: U.S. Bureau of the Census,
Series P-25, No. 922
(October 1982).

THE MARKET FOR MEN'S WEAR

Employment

Although the recession of 1981 - 1982, had a severe effect on employment in the U.S., white collar workers, prime consumers of tailored clothing, fared far better than blue collar workers. Overall, male employment between December 1981 and December 1982 declined by 1.3%, falling to 52.3 million workers. White collar worker employment during this same period actually registered a gain climbing 1.3% to 24.5 million males.

Male Employment by Occupational Group, Dec. 1982, Dec. 1981
(Males 16 Years of Age & Older)
(Numbers in Thousands)

	Dec. 1982	Dec. 1981	% Change 1982/1981	Percent of total 1982
Total males employed	52,290	52,962	- 1.3%	100.0%
White collar workers	24,482	24,160	+ 1.3	46.8
Professional & technical	9,377	9,239	+ 1.5	17.9
Managers & administrators	8,344	8,057	+ 3.6	16.0
Sales workers	3,496	3,400	+ 2.8	6.7
Clerical	3,266	3,464	- 5.7	6.2
Blue collar workers	21,513	22,865	- 5.9	41.1
Craft & kindred workers	10,657	11,176	- 4.6	20.4
Operatives, exc. transport	5,030	5,596	- 10.1	9.6
Transport operatives	2,862	2,971	- 3.7	5.5
Nonfarm laborers	2,964	2,946	+ 0.6	5.7
Service workers	4,418	4,267	+ 3.5	8.4
Farm workers	1,876	1,851	+ 1.4	3.6

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

RETAIL SALES

The men's tailored clothing classification encompasses a variety of products, including suits, tailored slacks, sport jackets, separate vests and topcoats, which are sold by a range of retail outlets. This diversity, along with the fact that retailers may classify some merchandise as either tailored clothing or sportswear, make it difficult to estimate the value of retail sales of men's tailored wear.

The latest official figures on sales of men's tailored clothing as well as rainwear types of retail outlets are in the 1977 Census of Retail Trade (U.S. Bureau of the Census).

Reported Sales of Men's Tailored Clothing, 1977
In Leading Outlet Types
(In Thous. of Dollars)

Store Type	Total	Overcoats & Topcoats	Suits, Other Formal Wear	Rainwear & Other Outerwear
Men's wear stores	$2,805,941	$204,994	$2,267,811	$333,136
Department stores*	2,048,628	293,073	1,413,891	341,664
Family clothing stores	728,444	88,468	522,843	117,133

* Includes discount department stores and department stores operated by national chains.

Source: U.S. Bureau of the Census,
1977 Census of Retail Trade

Based on data compiled from periodic reports from a nationwide, representative sample of households by NPD Special Industry Services, consumer spending for men's and boys' tailored clothing in 1981 was projected to a total of $6.1 billion. The share of total purchases accounted for by department stores has held steady at about 28% in recent years, but specialty stores, estimated to account for about 39% of the total in 1981, have lost ground in market share since 1977. In that year, NPD estimates give specialty stores a share of almost 43% of men's and boys' tailored clothing purchases. (Further information on consumer expenditures for tailored clothing, compiled by NPD Special Industry Services, will be found in the BUYING HABITS section of this Fact File).

Distribution of Purchases of Men's & Boys' Tailored Clothing
By Type of Retail Outlet, 1977, 1981

	1981	1977
Total consumer purchases	100.0%	100.0%
Men's wear specialty stores	38.6	42.7
Department stores	28.0	27.7
National chains (Sears, Ward, Penney)	18.2	14.9
General mdse., discount stores	8.3	7.8
Other	6.9	6.9

Source: NPD Special Industry Services

The share of men's clothing sales accounted for by department stores and specialty stores is much higher in higher price lines--representing as much as 90% of total sales. These outlets are securing their hold in this area through the establishment of designer labels and exclusive store brands.

At the medium price level, department and specialty stores have a share estimated at about 85%; national chains and discount houses make deep inroads on this share in popular-priced lines.

RETAIL SALES

Sales of men's suits, sport coats and vests were off 6.0% for the twelve month period ended March 1983, compared to the comparable year earlier period, according to data issued by NPD Special Industry Services (Menswear, July 1983). The same source, using a panel of 6,500 nationally representative families, reported that coat and outer jacket sales were off 3.7% during the same period while pants, jeans, slacks and shorts sales were up 3.9%. Overall, NPD reports that men's and boys' wear sales were up a meager 0.05%.

Men's & Boys' Wear Sales in Reported Classifications
(Percent Changes)

	4/82 - 3/83 vs. 4/81 - 3/82
Men's & boys' wear, total	+ 0.05%
Suits, sport coats & vests	- 6.0
Coats & outerjackets	- 3.7
Pants, jeans, slacks & shorts	+ 3.9
Shirts, sweaters & other tops	- 1.5
Underwear	+ 1.9
Socks, hosiery	- 1.4
Pajamas, robes	- 9.0
Accessories	+ 3.8

Source: NPD Special Industry Services,
NPD Group of Marketing & Research Companies.

RETAIL SALES BY PRODUCT

Suits

The men's suit industry over the last few years has been heavily dependent on selling at off-price in order to maintain reasonable inventory levels. As the U.S. economy slowly recovers from the 1981-1982 recession, industry analysts believe that consumers will purchase more units at full price than they had in the past.

Although unit sales of suits were off significantly overall between 1981 and 1982, "better" priced suits have been the least affected by the decline. Retailers report that sales of suits with prices over $300 were higher in 1982 than in 1981 with some reporting increases of better than 10%.

A recent survey (Daily News Record, February 10, 1983) by Hart, Schaffner & Marx's Research and Forecasting department indicated that in 1981 the retail market for men's suits stood at $1.68 billion, 51.8% above the figure registered for 1980. On a unit basis, this source indicates that the number of suits sold in the U.S. climbed from 29.8 billion in 1980 to 30.4 billion in 1981 with suits over $201 representing 13.1% of the 1980 total and 19.1% in 1982.

RETAIL SALES BY PRODUCT

Tailored Jackets/Sport Coats

The recessionary pressures of 1982, which caused many traditional suit customers to delay purchases of that item, are seen as the main reason for the upswing in tailored jacket/sport coat sales. Most analysts believe that consumers attempting to update wardrobes turned to sport coats and separate trousers as a less expensive means of accomplishing this. NPD Research, Inc. (Menswear, 1/10/83) reported that in 1982, sales of sport coats were up 13.5% over the previous year on a unit basis.

As in the case of suits, recent surveys indicate that sales of better priced jackets fared better than any other category. Hart, Schaffner and Marx's research and forecasting department revealed that between 1980 and 1981 sales of sport coats priced $150 and over were up 19.5% on a unit basis and 17.5% in dollars. These better sport coats, according to Hart, Schaffner and Marx, accounted for 14.2% of the industries total unit sales of 22.5 million units and approximately one-third of dollar volume ($644,319,000) in 1981.

Tailored Slacks

Industry analysts report that sales of men's tailored slacks were up significantly in 1982 as consumers took to this category (along with sport coats as noted above) as an inexpensive way of updating aging wardrobes. As retailers report sales gains of 5 to 10% for the year, analysts expect the category to continue its steady growth as separates gain more acceptance in the work place.

RETAIL SALES

By Store Type: Department Stores

As the recession began to ease around Christmas of 1982, department stores' sales recorded a marked gain. In 1982 overall, total department store sales were up only 3.2% reaching a total of $107.3 billion. Over the first five months of 1983, however, total sales were up 5.4% when compared to the first five months of 1982.

The Census Bureau reported in the 1977 Census that department store business, in total, had become more concentrated among the larger firms, a trend which is believed to have continued. In 1977, firms with annual sales of $100 million or more (79 firms) operated 83% of the department stores and accounted for close to 92% of department stores volume.

Department stores, in general, have increased their share of men's clothing business in recent years, particularly in higher-priced lines; and here inflation has been a factor in department stores' increased share. The larger, prestige stores have stepped up promotions through the use of designer labels.

The National Retail Merchants Association reports that in 1981, sales of all men's wear apparel was up 11.0% in department stores, while men's clothing registered an increase of 6.4% during the same period. Sales of suits and formal wear were reported to have declined in department stores in 1981 (-0.5%) while overcoats, topcoats, rain, storm and dual-purpose coats, as a group, marked a sharp increase of 11.8%.

RETAIL SALES

By Store Type: Department Stores

Men's Departmental Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million, 1981
Typical (median) Results

	All Adult Male Apparel	Men's Clothing	Overcoats, Topcoats Rain, Storm & Dual-Purpose Coats	Suits & Formal Wear
Net sales, % change from last year	+ 11.0%	+ 6.4%	+ 11.8%	- 0.5
Sales, % of merchandise division	100.0	36.1	6.4	7.0
Sales, % of total store sales	12.4	4.4	0.8	0.9
$ sales per square foot of selling space	$176.9	$160.7	$201.2	$246.4
Cumulative markon, %	50.3%	50.0%	49.6%	49.4%
Gross margin, % of sales including cash discounts	43.5	38.9	42.6	30.4
Markdowns, retail, % of sales	12.5	17.6	15.8	22.6
Returns, % of sales	8.0	9.4	13.3	10.7
Number of stock turns	2.8	2.4	2.9	1.7
Salespeople's salaries, % of sales	6.8	6.9	7.5	7.8
Sales promotions, % of sales	2.9	3.4	3.2	3.5

na = not available.

Source: National Retail Merchants Association,
"Merchandising & Operating Results,"
1983 Edition.

By Store Type: Men's Wear Stores

In the first five months of 1983, total sales of men's wear stores were up 2.2%. This compares with a loss in volume amounting to 0.5% in sales for the year 1982 compared with 1981. In higher-priced lines, a significant number of prestige specialty stores are placing increasing emphasis on their own private labels. Designer labels, too, are growing among men's wear stores.

The latest figures on the number of men's specialty stores in operation are from the 1980 County Business Patterns report (Department of Commerce) which reported the total count of those with paid employees at 18,106.

Like most other segments of the retail industry, the men's and boys' wear specialty store group is highly characterized by several large stores controlling a majority of the sales. In 1977, the last year which figures are available, 934 firms with sales of $1 million or more (5.5% of all firms) accounted for close to 50% of all men's and boys' wear volume. This compares with 42% in 1972.

RETAIL SALES

By Store Type: Men's Wear Stores

Men's & Boys' Clothing & Furnishings Stores by Employee Size, 1980

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Men's & boys' clothing & furnishings stores, total	18,106	100.0%	140,240	100.0%	$1,271.9	100.0%
By establishment size:						
Under 10 employees	13,994	77.3	62,732	44.7	542.9	42.7
10 to 19 employees	3,804	21.0	41,509	29.6	361.3	28.4
20 to 49 employees	910	5.0	25,841	18.4	252.0	19.8
50 to 99 employees	99	0.5	6,546	4.7	71.1	5.6
100 or more employees	19	0.1	3,612	2.6	44.6	3.5

Source: U.S. Bureau of the Census,
County Business Patterns, 1980

Menswear Retailers of America reports in the Annual Business Survey that in 1982 tailored wear represented 37% of men's and boys' specialty store sales down from the 37.9% reported a year earlier. Although three of the four categories showed increases in percentage of store sales, the suit categories fall from 17.6% to 16.4% in the one year period was more than enough to offset the gains.

Percent of Men's Wear Store Sales Accounted For
By Men's Tailored Clothing, 1981, 1982
(Median Results)

	All Firms		Firms Handling Men's Wear Only		Women's Wear	
	1982 (87 firms)	1981 (71 firms)	1982 (34 firms)	1981 (31 firms)	1982 (53 firms)	1981 (40 firms)
Total store sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's tailored wear	37.0	37.9	43.7	41.6	34.7	32.9
Men's suits	16.4	17.6	18.4	18.4	13.1	15.6
Sport coats	11.4	9.8	13.1	10.6	10.7	9.2
Dress slacks	8.3	7.6	9.6	9.3	7.1	7.0
Men's coats	2.1	2.0	2.5	2.7	1.9	1.8
Total men's clothing department sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Men's suits	43.6	45.2	42.7	44.4	43.9	45.3
Sport coats	30.1	27.8	31.1	26.7	30.1	28.9
Dress slacks	19.7	20.0	20.8	22.8	19.2	18.4
Men's coats	6.1	5.8	6.6	5.7	5.9	5.8

Source: Menswear Retailers of America,
Annual Business Survey,
June 1982, June 1983.

RETAIL SALES

Seasonal Patterns

Percent of Households Buying Reported Apparel Items Each Month, 1981

	Suits/Sport Coats	Coats/Raincoats/Outer Jackets
Annual total	100.0%	100.0%
January	1.5	2.3
February	1.1	1.5
March	1.4	1.3
April	1.9	1.0
May	1.0	0.8
June	1.4	0.7
July	1.4	0.4
August	1.3	1.0
September	1.4	1.3
October	1.9	2.5
November	1.7	2.6
December	3.5	3.9

Source: Newspaper Advertising Bureau based on NPD Special Industry Services reports

RETAIL ADVERTISING

Reports of newspaper advertising linage for 1981 showed overcoats to be advertised most heavily during the last quarter of the year, with November having the largest share of ad linage. The biggest month for advertising men's slacks is June, while the heaviest newspaper promotions on sport coats were in December. Men's suit advertising was heaviest in September in 1981.

Percent of Year's Total Newspaper Advertising Linage on Men's Clothing By Months, 1981

	Outercoats	Slacks	Sport Coats	Suits
Total	100.0%	100.0%	100.0%	100.0%
January	10.9	3.8	4.9	5.7
February	8.2	7.1	5.6	6.0
March	6.3	6.8	6.3	9.8
April	5.0	8.8	8.0	10.1
May	1.5	8.5	7.3	10.9
June	0.8	13.4	7.1	8.1
July	1.6	5.0	4.1	4.9
August	2.4	12.1	6.5	6.4
September	10.4	6.5	10.2	11.0
October	16.6	7.7	12.4	10.2
November	18.6	9.1	12.9	9.3
December	17.7	11.2	14.7	7.6

Source: Advertising Checking Bureau; Newspaper Advertising Bureau, Inc.

CONSUMER PRICE INDEX

The consumer price index for men's wear rose 3.8% in 1982, a much lower percentage than the 8.4% registered for all items, but much higher than the 1.7% increase recorded for apparel, excluding footwear. During this same one year period, the index for suits, sport coats and jackets was up 2.8%, while coats and jackets registered a 1.3% gain.

Between June 1982 and June 1983, the CPI for men's wear rose 2.9% while suits, sport coats and jackets had a 3.6% gain; coats and jackets were up 1.2%.

Consumer Price Indexes for Selected Men's Apparel Items
(12/77 = 100, unless otherwise noted)

	June Average			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
All items*	298.1	290.6	+ 2.6%	282.5	260.5	+ 8.4%
Apparel less footwear*	179.7	176.3	+ 1.9	177.0	174.0	+ 1.7
Men's wear	118.8	115.4	+ 2.9	116.0	111.7	+ 3.8
Suits, sport coats & jackets	111.2	107.3	+ 3.6	107.9	105.0	+ 2.8
Coats & jackets	100.7	99.5	+ 1.2	100.0	98.7	+ 1.3

* = 1967 = 100

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

The following information on purchases of men's tailored clothing and rainwear for men aged 17 years and older for the years 1982 and 1981 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on the findings from an on-going monthly panel tracking the purchases of 6,500 nationally representative families.

Suits

Percent of Men's Suit Purchases by Outlet

	1982		1981	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	36.2	48.4	43.2	52.7
Department stores	23.4	23.9	19.0	20.2
National chains	25.3	16.5	22.3	15.3
Discount stores, incl. K mart	9.7	7.4	7.1	6.0
All other outlets	5.4	3.8	8.4	5.8

CONSUMER BUYING HABITS

Suits

Percent of Men's Suit Purchases by Price Point

	1982		1981	
	Units	Dollars	Units	Dollars
Total sales	100.0%	100.0%	100.0%	100.0%
Less than $60	22.6	8.1	22.1	9.3
$60.00 - $79.99	15.0	10.1	18.3	12.2
$80.00 - $99.99	20.5	17.7	16.0	13.6
$100.00 - $139.99	17.6	19.4	20.8	23.5
$140.00 - $199.99	14.4	22.2	15.2	22.9
$200.00 & over	9.9	22.5	7.6	18.5

Percent of Men's Suit Purchases by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units													
1982	9.0	7.6	13.9	9.8	7.4	8.5	8.9	4.9	3.1	9.0	8.5	9.4	100.0%
1981	10.5	7.8	9.4	10.0	6.2	9.9	6.5	6.8	5.5	8.2	9.0	10.2	100.0
Dollars													
1982	9.7	7.0	12.5	8.6	7.2	8.8	8.8	5.1	2.6	9.5	10.5	9.7	100.0
1981	10.4	8.1	8.7	9.3	5.6	8.1	7.2	6.5	5.4	10.6	9.8	10.3	100.0

Percent of Men's Suit Purchases by Type of Fabric

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Polyester & polyester blends	59.3	48.9	60.1	53.6
Wool & wool blends	1.1	0.7	3.0	1.9
Cotton & cotton blends	20.5	31.9	17.0	24.2
All other materials	1.1	1.0	2.0	2.9
No answer	18.0	17.5	17.9	17.4

Source for preceding tables: NPD Special Industry Services, Inc.

Sport Coats

Percent of Men's Sport Coat Purchases by Outlet Type

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Department stores	31.8	30.7	31.1	30.3
Men's specialty stores	28.3	39.0	29.8	39.3
National chains	18.5	13.7	23.0	16.1
Discounters, incl. K. mart	12.5	9.5	9.4	8.0
Other	8.9	7.1	6.7	6.3

CONSUMER BUYING HABITS

Sport Coats

Percent of Men's Sport Coat Purchases by Price Point

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Less than $40.00	23.5	8.9	29.5	12.3
$40.00 - $59.99	27.8	20.7	25.8	20.4
$60.00 - $79.99	22.5	22.6	18.4	19.4
$80.00 - $119.99	16.1	22.2	16.3	23.4
$120.00 & over	10.1	25.6	10.0	24.5

Percent of Men's Sport Coat Sales by Type of Fabric

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Polyester & polyester blends	48.7	37.0	53.7	45.2
Cotton & cotton blends	5.8	4.8	4.7	2.9
Wool & wool blends	27.5	34.7	22.8	30.0
All other materials	5.9	10.3	5.5	8.2
No answer	12.1	13.2	13.3	13.7

Percent of Men's Sport Coat Purchases by Month

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1982													
Units	8.5%	5.9%	6.3%	6.6%	7.4%	7.9%	5.8%	6.2%	7.2%	10.1%	9.5%	18.6%	100.0%
Dollars	8.8	5.1	4.6	7.9	6.6	9.3	7.1	6.1	6.3	9.3	10.0	18.9	100.0
1981													
Units	7.0	5.6	4.6	10.6	7.6	8.4	6.2	6.5	7.1	10.1	7.2	19.1	100.0
Dollars	7.5	5.1	3.7	9.2	7.7	7.8	5.1	5.8	7.4	9.8	8.0	22.9	100.0

Source for preceding tables: NPD Special Industry Services, Inc.

Raincoats

Percent of Men's Raincoat Purchases by Store Type

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Men's specialty stores	47.8	26.8	14.5	26.2
Discounters, incl. K mart	18.5	24.2	18.7	19.5
Department stores	9.3	22.3	17.2	26.9
National chains	13.5	15.8	23.7	17.9
Others	10.9	10.9	25.9	9.5

CONSUMER BUYING HABITS

Raincoats

Percent of Men's Raincoat Purchases by Price Line

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Less than $10.00	54.0	6.5	34.5	7.3
$10.00 - $19.99	22.8	16.3	29.5	14.9
$20.00 - $49.99	8.8	14.3	17.5	21.4
$50.00 - $79.99	9.4	32.4	10.7	25.9
$80.00 & over	5.0	30.5	7.8	30.5

Percent of Men's Raincoat Purchases by Type of Fabric

	1982		1981	
	Units	Dollars	Units	Dollars
Total purchases	100.0%	100.0%	100.0%	100.0%
Cotton & cotton blends	39.1	6.4	2.0	9.0
Vinyl	31.9	17.4	46.7	14.8
Polyester & polyester blends	14.7	54.5	25.7	54.3
Nylon & nylon blends	5.2	4.0	11.5	6.2
All other materials	2.9	8.6	3.4	4.4
Not reported	6.2	9.1	10.7	11.3

Percent of Men's Raincoat Purchases by Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Units												
1982	2.6%	3.5%	1.6%	1.7%	9.5%	7.3%	1.0%	1.5%	42.4%	7.7%	13.1%	8.1%
1981	10.3	9.7	1.0	2.0	6.9	5.4	7.0	13.4	5.8	8.5	13.4	16.6
Dollars												
1982	2.2	9.5	0.1	1.5	19.6	11.0	0.3	0.4	11.6	9.5	26.1	8.2
1981	16.2	14.1	0.5	2.5	5.7	13.1	7.9	7.1	4.6	4.7	6.8	16.9

Source for the preceding tables: NPD Special Industry Services, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month. (September)

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

Women's Inner Fashions: Nightwear, Daywear and Loungewear

FAIRCHILD FACT FILE

Prepared by

Market Research Division

Audrey S. Balchen, Director

Jeffrey Olwell, Research Analyst

Distributed through

Book Division

Fairchild Publications

Division of Capital Cities Media, Inc.

New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:

- GENERAL INDUSTRY STATISTICS.................................. 1
  - APPARENT CONSUMPTION...................................... 4
  - EMPLOYMENT & EARNINGS..................................... 4
  - CONCENTRATION IN THE INDUSTRY............................. 5
  - LEADING STATES.. 7
- PRODUCTION.. 7
  - MATERIALS CONSUMED..11
- SHIPMENTS...11
- PRODUCER PRICE INDEX..14
- FOREIGN TRADE -- IMPORTS....................................15
- FOREIGN TRADE -- EXPORTS....................................17

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET..19
- RETAIL SALES BY PRODUCT.....................................20
- RETAIL SALES BY STORE TYPE..................................20
- SEASONAL PATTERN IN RETAIL SALES............................24
- RETAIL ADVERTISING..25
- CONSUMER PRICE INDEX..26
- CONSUMER BUYING HABITS......................................26

SCHEDULE OF ADDITIONAL FACT FILES.............................35

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1983 by Fairchild Publications

Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-462-7

Printed in the United States of America

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR & LOUNGEWEAR

Market Trends

Sales of women's inner fashions--a roughly $5 billion retail market in 1982--were up 10-15% through the first half of 1983, aided by the general economic recovery in the U.S. Expectations are for sales to continue strong through fall 1983 and into 1984.

For leisurewear and sleepwear, especially, the trend has been to emulate fashion trends set by ready-to-wear and sportswear manufacturers through the use of new (to this market) colors and other flourishes. In leisurewear, these added touches allow the garment to be worn outside the home--a sales plus.

Fad and fashion are becoming almost as important as function in the purchase of lingerie. According to a trade source, reasons other than need accounted for 45% of lingerie sales in 1982 against 5% only five years ago. For example, non-white bra sales account for between 12% and 15% of the approximately $1.3 billion market in 1981. Beige is by far the most popular color.

Designs, colors and natural fibers have helped panty sales to climb to close to $1 billion in 1982 from only $0.6 billion as recently as 1979. An important impetus to sales of panties, and for inner fashions overall, is the proliferation of designer names in this market.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The 1981 Annual Survey of Manufactures, compiled by the U.S. Bureau of the Census, provides the latest available information on women's inner fashions at the manufacturer level. The ASM is based on a sample of manufacturers and is conducted in interim years between the complete census of manufactures, conducted every five years. It is adjusted for comparability with the most recent census data covering the year 1977.

The value of industry shipments (including both primary and secondary products and miscellaneous receipts) in the women's, misses', children's and infants' underwear industry reached $2.6 billion in 1981, a 7.0% gain over 1980. According to the Bureau of Industrial Economics publication, U.S. Industrial Outlook 1983, the industry shipment value increased 5.2% in 1982 to $2.735 billion. The value added by manufacture was estimated by the BIE at $1.405 billion in 1982, down 0.4% from the 1981 value shown in the ASM data.

At a constant 1972 dollar rate, the value of industry shipments was off 0.6% in 1982, but has risen at a compound annual rate of 2.0% in the ten year period ending in 1982, according to the BIE.

GENERAL INDUSTRY STATISTICS

Women's, Misses', Children's & Infants' Underwear & Nightwear (SIC 2341*)

	1981	1980	1979	1977
Number of companies	na	na	na	548
Number of establishments, total**	na	648#	663#	698
Number with 20 or more employees	na	456#	459#	479
Employees, total (thous.)	77.4	79.6	78.0	72.9
Production workers (thous.)	66.6	68.1	66.2	63.4
Payroll (mil. $)	$ 650.6	$ 633.9	$ 571.8	$ 472.1
Value added by manufacture (mil. $) ##	1,411.1	1,317.5	1,163.8	915.3
Value of industry shipments (mil. $) ###	2,599.3	2,428.6	2,187.8	1,780.8
Capital expenditures, new (mil. $)	27.7	29.3	22.3	18.7

Brassieres, Girdles & Allied Products (SIC 2342*)

	1981	1980	1979	1977
Number of companies	na	na	na	150
Number of establishments, total**	na	150#	150#	180
Number with 20 or more employees	na	111#	115#	116
Employees, total (thous.)	14.6	14.6	16.6	18.9
Production workers (thous.)	12.0	11.9	13.2	15.2
Payroll (mil. $)	$ 143.5	$ 133.2	$ 139.5	$ 141.1
Value added by manufacture (mil. $) ##	332.0	304.3	330.2	334.4
Value of industry shipments (mil. $ ###	617.7	566.5	634.2	650.0
Capital expenditures, new (mil. $)	6.0	6.2	6.5	4.2

Knit Underwear Mills (SIC 2254*)

	1981	1980	1979	1977
Number of companies	na	na	na	80
Number of establishments, total**	na	84#	86#	92
Number with 20 or more employees	na	72#	75#	74
Employees, total (thous.)	25.0	25.9	28.2	25.2
Production workers (thous.)	22.5	23.6	25.3	23.4
Payroll (mil. $)	$ 247.3	$ 245.0	$ 228.3	$ 175.2
Value added by manufacture (mil. $) ##	385.1	392.2	405.0	305.7
Value of industry shipments (mil. $) ###	841.2	863.5	802.2	648.9
Capital expenditures, new (mil. $)	17.2	21.4	32.7	14.5

(continued)

GENERAL INDUSTRY STATISTICS

Robes & Dressing Gowns (SIC 2384*)

	1981	1980	1979	1977
Number of companies	na	na	na	137
Number of establishments, total**	na	138#	144#	151
Number with 20 or more employees	na	91#	93#	98
Employees, total (thous.)	9.9	11.6	10.6	9.5
Production workers (thous.)	8.7	9.4	9.2	8.2
Payroll (mil. $)	$ 92.4	$ 72.7	$ 85.2	$ 64.3
Value added by manufacture (mil. $) ##	197.9	218.7	175.3	139.5
Value of industry shipments (mil. $) ###	356.0	441.6	355.3	288.3
Capital expenditures, new (mil. $)	4.6	6.2	4.7	3.3

na = not available

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2341 - This industry comprises establishments primarily engaged in manufacturing women's, misses', children's and infants' underwear and nightwear cut and sewed from purchased woven or knit fabric.

SIC 2342 - This industry comprises establishments primarily engaged in manufacturing brassieres, girdles, corsets, corset accessories, and allied garments.

SIC 2254 - This industry comprises establishments primarily engaged in knitting underwear and nightwear from yarn or in manufacturing underwear and nightwear from knit fabric produced in the same establishments. Industry figures include underwear and nightwear for both men and women as well as for children and infants.

SIC 2384 - This industry comprises establishments primarily engaged in manufacturing men's and women's robes and dressing gowns.

**Each business location is counted as a separate establishment.

#Covers only establishments with paid employees, as reported in County Business Patterns, U.S. Department of Commerce.

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value of measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b., plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales).

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Survey of Manufactures, 1980, 1981.

GENERAL INDUSTRY STATISTICS

Apparent Consumption

U.S. apparent consumption (domestic shipments plus imports minus exports) of women's, girls' and infants' underwear was valued at $1.0 billion in 1982 at approximately the wholesale level. The quantity available at retail, excluding existing inventories, was 66.9 thousand dozen.

U.S. Apparent Consumption of Women's & Children's Underwear & Pajamas, 1982

QUANTITY (Thous. Dozen)

	Shipments	Exports	Imports	Apparent Consumption
Women's, girls' & infants':				
Underwear	61,966	2,009	6,935	66,892
Pajamas	19,864	444	1,382	20,802

VALUE (Mil. $)

	Shipments	Exports	Imports**	Apparent Consumption
Underwear	$ 951.3	$ 18.2	$ 48.2	$ 980.1
Pajamas	1,210.0	14.1	67.6	1,262.5

*Estimated producers' value, which excludes freight, insurance and other charges incurred in moving goods to the port of export.

**C.I.F. value at first port of entry in the U.S. plus import duties. For a further explanation of C.I.F. value, see the Import section on page 16.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
MA23G(82)-1

Employment & Earnings

Average employment in knit underwear mills rose 2.8% in the January to May 1983 period compared to a year ago, following a 5.6% decline in employment for the full year 1982 versus 1981. Weekly earnings of production workers in these mills averaged $195.46 during the first five months of 1983, up 17.9% from a year ago.

Employment in both the women's and children's underwear industry and women's brassieres and allied garments industry continued to fall in early 1983, as it had in 1982. In all three industries tracked by the Bureau of Labor Statistics, the wages of production workers rose largely due to increased working hours rather than big increases in the pay rate.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in Selected Women's Inner Fashion Industries

	Jan.-May Average			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
Knit underwear mills:						
All employees (thous.)	29.3	28.5	+ 2.8%	28.7	30.4	- 5.6%
Production workers (thous.)	24.7	24.1	+ 2.5	24.3	26.3	- 7.6
Average weekly earnings	$195.46	$165.82	+17.9	$177.33	$177.48	- 0.1
Average hourly earnings	5.32	5.14	+ 3.5	5.17	4.93	+ 4.9
Average weekly hours	36.7	32.3	+13.6	34.3	36.0	- 4.7
Women's & children's underwear:						
All employees (thous.)	66.5	68.5	- 2.9	67.9	71.7	- 5.3
Production workers (thous.)	57.5	59.7	- 3.7	59.0	62.5	- 5.6
Average weekly earnings	$169.41	$155.69	+ 8.8	$161.47	$162.34	- 0.5
Average hourly earnings	4.86	4.80	+ 1.2	4.64	4.46	+ 4.0
Average weekly hours	35.4	33.7	+ 5.0	34.8	36.4	- 4.4
Women's brassieres & allied garments						
All employees (thous.)	14.8	16.7	-11.4	15.6	18.1	-13.8
Production workers (thous.)	11.2	12.8	-12.5	11.8	14.2	-16.9
Average weekly earnings	$180.14	$163.08	+10.5	$170.52	$170.77	- 0.1
Average hourly earnings	5.14	5.08	+ 1.2	5.09	4.77	+ 6.7
Average weekly hours	35.1	32.1	+ 9.3	33.5	35.8	- 6.4

Source: U.S. Bureau of Labor Statistics
Employment & Earnings.

Concentration in the Industry

The Women's Inner Fashion Industry by Employment Size, 1980

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Women's & children's underwear & nightwear (SIC 2341), total	648	100.0%	73.7	100.0%
Under 20 employees	192	29.6	na	--
20-99 employees	232	35.8	12.2	16.6
100-499 employees	204	31.5	46.6	63.2
500 or more employees	20	3.1	na	--

(continued)

Concentration in the Industry

The Women's Inner Fashion Industry by Employment Size, 1980
(continued)

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Brassieres & allied garments (SIC 2342), total	150	100.0%	16.7	100.0%
Under 20 employees	39	26.0	0.3	1.9
20-99 employees	67	44.7	3.8	22.7
100-499 employees	39	26.0	9.1	54.7
500 or more employees	5	3.3	3.5	20.7
Knit underwear mills (SIC 2254), total	84	100.0	24.9	100.0
Under 20 employees	12	14.3	0.1	0.4
20-99 employees	27	32.1	1.7	6.8
100-499 employees	34	40.5	8.2	32.9
500 or more employees	11	13.1	14.9	59.9
Robes & dressing gowns (SIC 2384), total	138	100.0	9.5	100.0
Under 20 employees	47	34.1	na	--
20-99 employees	64	46.4	3.1	32.8
100-499 employees	26	18.8	5.2	54.4
500 or more employees	1	0.7	na	--

na = not available

Source: U.S. Bureau of the Census,
County Business Patterns 1980.

The 50 largest firms (ranked on shipment value) in the women's and children's underwear industry controlled 63% of the industry shipment value in 1977, although they accounted for only 9% of all firms classified in the industry. A fifth of the value of shipments in this industry was attributed to the top four firms alone.

In the three remaining industries--brassieres and allied garments, knit underwear mills, and robes and dressing gowns--the 50 leading companies accounted for over 90% of the industry shipment value.

Percent of Selected Industry Activity Accounted For By the 50 Largest Companies in Each Industry, 1977

	Companies	Plants	Value Added by Manufacture	Value of Industry Shipments
Women's & children's underwear (SIC 2341), total	548	698	$ 915.3	$ 1,780.8
Share accounted for by:				
4 largest companies	0.7%	4.2%	19.9%	21.5%
8 largest companies	1.4	6.8	29.2	27.5
20 largest companies	3.6	11.7	42.7	41.7
50 largest companies	9.1	22.7	63.1	63.2

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Percent of Selected Industry Activity Accounted For By the 50 Largest Companies in Each Industry, 1977
(continued)

	Companies	Plants	Value Added by Manufacture	Value of Industry Shipments
Brassieres & allied garments (SIC 2342), total	150	180	$ 334.4	$ 650.0
Share accounted for by:				
4 largest companies	2.7%	7.8%	38.4%	36.4%
8 largest companies	5.4	13.4	55.4	52.2
20 largest companies	13.4	25.1	77.0	77.2
50 largest companies	33.4	43.4	92.1	92.3
Knit underwear mills (SIC 2254), total	80	92	$ 305.7	$ 648.9
Share accounted for by:				
4 largest companies	5.0%	6.5%	37.0	42.1
8 largest companies	10.0	13.0	53.6	58.5
20 largest companies	25.0	32.6	83.0	84.5
50 largest companies	62.5	67.4	98.3	98.6
Robes & dressing gowns (SIC 2384), total	137	151	$ 139.5	$ 288.3
Share accounted for by:				
4 largest companies	2.9%	5.3%	21.8	25.3
8 largest companies	5.8	10.6	34.1	43.6
20 largest companies	14.6	21.2	62.6	69.1
50 largest companies	36.5	41.7	84.9	90.2

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Concentration Ratios in Manufacturing,
MC77-SR-9.

By Leading States

In the women's, misses', children's and infants' underwear and nightwear industry, the U.S. Industrial Outlook 1983 estimated that 23% of the total industry shipments (value) in 1982 came from New York State plants. Other major producing states along with their percentage of industry shipments are: North Carolina (13%), Pennsylvania (9%), Georgia (6%) and Massachusetts (2%).

PRODUCTION

Official estimates of the annual U.S. production and value of shipments of specified women's innerwear and nightwear items are released by the Census Bureau as part of the Current Industrial Reports series. The estimates are based on a survey of manufacturers, contractors and jobbers and includes items cut in the U.S. and sent outside the country to be sewn, as well as products from Puerto Rican plants.

PRODUCTION

For the report covering 1982, approximately 40 establishments were added to the survey. None of these firms were asked to supply production or shipment data for years prior to 1982. Consequently, the estimates derived for 1982 are not directly comparable with earlier years. However, the data can be adjusted to yield a rough estimate of the percentage change in production between 1981 and 1982.

Estimated Percent Change in Production Quantity, 1982/1981

	1982 Quantity (Thous. Doz.)	Adjusted % Change 1982/1981
Women's, misses' & juniors':		
Full-length slips	3,019	- 1.5%
Half-slips, excluding pettipants	2,634	- 3.6
Panties, including pettipants	34,808	+ 0.1
Union suits, camisoles, thermal underwear, etc.	2,957	+ 15.0
Nightwear & sleepcoats, excluding sets with robes	9,829	- 5.0
Pajamas, except sets with robes	1,787	- 5.8
Peignoir & robe sets with nightgown or pajamas	1,151	- 2.6
Separate bedjackets & peignoirs, excluding lounge robes	103	- 50.9
Robes, dressing gowns, housecoats, etc.	2,616	- 2.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
MA23G(82)-1.

The current CIR on women's innerwear and nightwear also provides detailed production information on fabric and construction use. Comparable data for earlier years is not available at this level of detail.

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1982

	Thous. Dozen Units	% of Total
Full length slips	3,019	100.0%
By construction:		
Woven fabric	519	17.2
Knit fabric	2,414	80.0
Fabric, n.s.k.	86	2.8
By fabric:		
All cotton & chiefly cotton	92	3.0
All man-made & chiefly man-made	2,343	77.6
All other fabric Fabric, n.s.k.	584	19.3

(continued)

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1982
(continued)

	Thous. Dozen Units	% of Total
Half-slips, excluding pettipants	2,634	100.0%
By construction:		
Woven fabric	520	19.7
Knit fabric	1,862	70.7
Construction, n.s.k.	252	9.6
By fabric:		
All cotton & chiefly cotton	68	2.6
All man-made & chiefly man-made	2,350	89.2
Fabric, n.s.k.	216	8.2
Panties, including pettipants	34,808	100.0%
By construction:		
Woven fabric	851	2.4
Knit fabric	31,792	91.3
Construction, n.s.k.	2,165	6.2
By fabric:		
All cotton & chiefly cotton	8,011	23.0
All man-made & chiefly man-made	24,800	71.2
All other fabric Fabric, n.s.k.	1,997	5.7
Union suits, camisoles, thermal underwear, etc.	2,957	100.0%
By construction:		
Woven fabric	41	1.4
Knit fabric	1,901	64.3
Construction, n.s.k.	1,015	34.3
By fabric:		
All cotton & chiefly cotton	411	13.9
All man-made & chiefly man-made	1,608	54.4
All other fabric Fabric, n.s.k.	938	31.7
Nightgowns & sleepcoats, excluding sets with robes	9,829	100.0%
By construction:		
Woven fabric	3,942	40.1
Knit fabric	5,420	55.1
Construction, n.s.k.	467	4.7
By fabric:		
All cotton & chiefly cotton	1,402	14.3
All man-made & chiefly man-made	7,968	81.1
All other fabric Fabric, n.s.k.	459	4.6

(continued)

Production of Reported Types of Women's Innerwear & Nightwear By Fabric & Construction, 1982

(continued)

	Thous. Dozen Units	% of Total
Pajamas, except sets with robes	1,787	100.0%
By construction:		
Woven fabric	665	37.2
Knit fabric	810	45.3
Construction, n.s.k.	312	17.5
By fabric:		
All cotton & chiefly cotton	439	24.6
All man-made & chiefly man-made	1,035	57.9
All other fabric		
Fabric, n.s.k.	313	17.5
Peignoir & robe sets with nightgown or pajamas	1,151	100.0%
By construction:		
Woven fabric	303	26.3
Knit fabric	550	47.8
Construction, n.s.k.	298	25.9
By fabric:		
All cotton & chiefly cotton	29	2.5
All man-made & chiefly man-made	842	73.1
All other fabric		
Fabric, n.s.k.	280	24.3
Separate bedjackets & peignoirs, excluding lounge robes	103	100.0%
By construction:		
Woven fabric	29	28.1
Knit fabric	45	43.7
Construction, n.s.k.	29	28.1
By fabric:		
All cotton & chiefly cotton	25	24.3
All man-made & chiefly man-made	45	43.7
Fabric, n.s.k.	33	32.0
Robes, dressing gowns, housecoats, etc.	2,616	100.0%
By construction:		
Woven fabric	1,128	43.1
Knit fabric	1,065	40.7
Construction, n.s.k.	423	16.2
By fabric:		
All cotton & chiefly cotton	301	11.5
All man-made & chiefly man-made	1,865	71.3
All other fabric		
Fabric, n.s.k.	450	17.2

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Underwear & Nightwear MA23G(82)-1.

PRODUCTION

Materials Consumed in Production

The 212 million pounds of fiber used to produce women's and children's innerwear and nightwear products in 1981 was 2.7% less than the amount used in 1980 and a substantial 12.0% decline compared with 1980. It also represented the least amount of fiber used since 1976, according to the Textile Economics Bureau.

Construction of Fibers in the Production of Women's & Children's Innerwear & Nightwear, 1979-1981

	Millions of Pounds			
	1981	1980	1979	% Change 1981/1980
Innerwear & nightwear, total*	212.0	217.9	240.8	- 2.7%
Man-made fibers, total	162.0	169.0	184.1	- 4.1
Cellulosic	18.3	20.3	20.8	- 9.8
Non-cellulosic	143.7	148.7	163.3	- 3.4
Cotton	48.8	47.9	55.7	+ 1.9
Wool	1.2	1.0	1.0	+ 20.0
Robes & loungewear, total**	126.9	148.1	134.2	- 14.3
Man-made fibers, total	104.8	126.3	110.8	- 17.0
Cellulosic	47.1	63.4	61.4	- 25.7
Non-celluiosic	57.7	62.9	49.4	- 8.3
Cotton	19.3	19.4	20.9	- 0.5
Wool	2.8	2.4	2.5	+ 16.7

* Excludes trim, elastic webbing, apparel lace braid or narrow fabric used.
**Includes men's and boys' beach and bath robes, dressing gowns and smoking jackets as well as women's beach and bath robes and housecoats.

Source: Textiles Economics Bureau, Inc.
Textile Organon, November 1982

SHIPMENTS

As noted in the PRODUCTION section of the Fact File, 40 innerwear/nightwear firms, which did not report in 1981, were included in data on production and shipments compiled by the Census Bureau for the year 1982. In the following table, reported figures on value of shipments are shown, as well as percentage comparisons with 1981 based on adjustments in the data reported for that year.

SHIPMENTS

Value of Shipments of Women's Innerwear & Nightwear by All U.S. Producers & Estimated Percent Change, 1982/1981

	Value of Shipments 1982 (Mil. $)	% Change 1982/1981 (adjusted)
Women's, misses' & juniors':		
Full-length slips	$ 183.5	+ 8.9%
Half-slips, excluding pettipants	116.8	+ 10.4
Panties, including pettipants	398.6	+ 6.1
Union suits, camisoles, thermal underwear, etc.	96.8	+ 10.6
Nightgowns & sleepcoats, excluding sets with robes	680.0	- 0.3
Pajamas, except sets with robes	117.2	- 6.1
Peignoir & robe sets with nightgown or pajamas	125.0	- 1.9
Separate bedjackets & peignoirs, excluding lounge robes	11.7	- 34.6
Robes, dressing gowns, housecoats, etc.	298.3	- 2.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Underwear & Nightwear MA-23G(82)-1.

In the 1983 U.S. Industrial Outlook, the Bureau of Industrial Economics estimated that 1982 women's and children's underwear and nightwear shipments, measured in constant 1972 dollars, were up 1.7% over the previous year. During the 1972-1982 period, the shipment value of these products increased at the compound annual rate of 1.7%

Total U.S. value of shipments of brassieres, girdles and allied garments slipped 0.3% to $879.6 million in 1982 on a 5.7% decline in the number shipped. Shipments from Puerto Rican plants rose in value to $308.5 million, 1.8% higher than in 1981, although the quantity shipped fell 9.0% to 6.4 million dozen. The value of brassieres and girdles shipped from Puerto Rican plants represented 35.1% of the total U.S. shipment value.

Quantity & Value of Shipments of Brassieres, Girdles & Allied Garments From Domestic & Puerto Rican Producers, 1981, 1982

	Quantity (Thous. Dozen)			Value of Shipments (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Brassieres, girdles & allied garments, total	20,370	21,612	- 5.7%	$879.6	$882.4	- 0.3%
Domestic producers	14,011	14,621	- 4.2	571.1	579.3	- 1.4
Puerto Rican producers	6,359	6,991	- 9.0	308.5	303.1	+ 1.8

(continued)

SHIPMENTS

Quantity & Value of Shipments of Brassieres, Girdles & Allied Garments From Domestic & Puerto Rican Producers, 1981, 1982

(continued)

	Quantity (Thous. Dozen)			Value of Shipments (Mil. $)		
	1982	1981	% Change 1982/1981	1982	1981	% Change 1982/1981
Brassieres, bra-lettes & bandeaux, total	16,711	17,650	- 5.3%	$695.7	$692.5	+ 0.5%
Domestic producers	11,409	11,921	- 4.3	436.6	449.0	- 2.8
Puerto Rican producers	5,302	5,729	- 7.4	259.1	243.5	+ 6.4
Girdles & other foundation garments, total	3,659	3,962	- 7.6	183.9	189.9	- 3.2
Domestic producers	2,602	2,700	- 3.6	134.5	130.3	+ 3.2
Puerto Rican producers	1,057	1,262	- 16.2	49.4	59.6	- 17.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles & Allied Garments
MA-23J(81)-1.

Shipments of Women's Foundation Garments by All U.S. Producers, By Factory (Wholesale) Price Line, 1981, 1982

	Quantity (Thous. Dozen)		
	1982	1981	% Change 1982/1981
Brassieres, bra-lettes & bandeaux	16,711	17,650	- 5.3%
Brassieres (with band 3" or more) excluding bra-lettes	510	579	- 11.9
Bra-lettes (hip-length with garters) including briefers	54	69	- 21.7
Bandeaux (with less than 3" bands)	16,147	17,002	- 5.0
Strap, regular	10,929	11,323	- 3.5
$12.75 & under per dozen	430	521	- 17.5
$12.76 to $15.50 per dozen	651	571	+ 14.0
$15.51 to $19.25 per dozen	742	933	- 20.4
$19.26 to $30.00 per dozen	1,902	2,460	- 22.7
$30.01 & over per dozen	7,204	6,838	+ 5.3
Strap, padded or contour-lined	4,258	4,633	- 8.1
Strapless or convertible	960	1,046	- 8.2
Girdles, corsets & other foundation garments	3,659	3,962	- 7.6
Corsets (back-laced or front laced)	4	6	- 33.3
Girdles	3,145	3,541	- 11.2

(continued)

SHIPMENTS

Shipments of Women's Foundation Garments by All U.S. Producers, By Factory (Wholesale) Price Line, 1981, 1982
(continued)

	Quantity (Thous. Dozen) 1982	Quantity (Thous. Dozen) 1981	% Change 1982/1981
Girdles (continued)			
Girdles (with opening) including girdles made of latex	667	795	- 16.1%
$36.00 & under per dozen	242	243	- 0.4
$36.01 to $65.99 per dozen	279	400	- 30.2
$66.00 to $95.99 per dozen	86	94	- 8.5
$96.00 & over per dozen	60	58	+ 3.4
Girdles (without opening) including girdles made of latex	2,478	2,746	- 9.8
$30.00 & under per dozen	989	1,160	- 14.7
$30.01 to $51.00 per dozen	644	730	- 11.8
$51.01 & over per dozen	845	856	- 1.3
Combination & one-piece garments (corselets)	303	223	+ 35.9
Maternity foundation garments (including corsets & combination)	50	54	- 7.4
Garter belts	157	138	+ 13.8

NOTE: Includes foundation garments made in Puerto Rican plants.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Brassieres, Girdles and Allied Garments,
MA-23J(81)-1.

PRODUCER PRICE INDEX

Most women's inner fashion items at the producer (factory) price level rose faster than did the overall commodities index during the first five months of 1983, according to the Bureau of Labor Statistics. While the index for all commodities increased only 0.8% compared with the January to May 1982 period and all women's apparel actually declined 0.5%, the index for nightgowns and sleepcoats showed a 5.6% rise. Panties were up 4.3% and brassieres, 3.7%.

PRODUCER PRICE INDEX

Producer Price Indexes of Selected Types of Women's Innerwear & Nightwear, 1981, 1982 & January-May, 1982, 1983
(1967=100 unless otherwise indicated)

	January-May Averages			Annual Averages		
	1983	1982	% Change 1983/1982	1982	1981	% Change 1982/1981
All commodities	300.8	298.3	+ 0.8%	299.3	293.4	+ 2.0%
Apparel	194.1	193.6	+ 0.3	194.4	186.0	+ 4.5
Women's	171.6	172.4	- 0.5	173.1	164.4	+ 5.3
Brassieres	221.4	213.4	+ 3.7	215.3	194.3	+ 10.8
Girdles, corsets, combinations & accessories	178.4	172.4	+ 3.4	173.7	163.3	+ 6.4
Panties (12/77=100)	148.8	142.6	+ 4.3	143.6	139.0	+ 3.3
Slips, half-slips & petticoats (12/77=100)	142.5	142.7	- 0.1	142.7	136.7	+ 4.4
Nightgowns & sleepcoats	157.8	149.4	+ 5.6	152.8	145.3	+ 5.2

Source: U.S. Department of Labor.

FOREIGN TRADE

Imports

Imports of women's and children's brassieres were valued at $157.4 million (C.I.F.) in 1982, 2.1% less than the 1981 valuation of $160.8 million. The quantity imported also declined, by 9.1% to 11.5 million dozen. Women's and children's undergarment imports increased 29.2% in value to $108.3 million in 1982 on a 26.2% rise in the number imported to almost 9 million dozen.

According to the Census Bureau, brassieres cut in the U.S., sent outside the country to be sewn and then shipped back to the U.S. (an "807" import) constituted about 65% of total brassiere imports in dollars and 83% in quantity during 1981, the latest year for which this information is available. For girdles, corsets, combinations and accessories, "807" imports accounted for approximately 29% of import dollars and 25% of import quantity in 1981.

Women's and children's underwear and nightwear imports accounted for only 4.3% of new supply (domestic shipments plus imports) in 1982, according to the Bureau of Industrial Economics.

FOREIGN TRADE

Imports

Imports of Women's & Children's Innerwear & Nightwear By Leading Countries of Origin, 1981, 1982

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1982	1981	% Change 1982/81	1982	1981	% Change 1982/81
Brassieres, total	11,521.5	12,674.0	- 9.1%	$157.4	$160.8	- 2.1%
Cotton	136.2	97.6	+ 39.5	1.8	1.2	+ 50.0
Philippines	91.7	52.1	+ 76.0	1.0	0.5	+100.0
Dominican Republic	21.0	10.8	+ 94.4	0.3	0.1	+200.0
Man-made fibers	11,378.1	12,572.9	- 9.5	155.3	159.4	- 2.6
Philippines	2,530.9	3,132.3	- 19.2	25.0	28.7	- 12.9
Dominican Republic	1,579.5	1,692.0	- 6.6	23.2	23.5	- 1.3
Costa Rica	1,503.6	1,546.2	- 2.8	18.1	17.3	+ 4.6
All other materials	7.2	3.5	+105.7	0.3	0.2	+ 50.0
France	3.0	1.1	+172.7	0.2	0.09	+122.2
Corsets, garters & other body-supporting garments	nr	nr	--	12.9	12.9	--
Mexico	nr	nr	--	4.2	6.4	- 34.4
Haiti	nr	nr	--	1.4	2.0	- 30.0
Undergarments, nspf, of textile materials, total	8,802.0	6,973.4	+ 26.2	108.3	83.8	+ 29.2
Not knit	1,399.1	1,114.5	+ 25.5	46.8	38.3	+ 22.2
Hong Kong	546.7	452.4	+ 20.8	20.0	16.3	+ 22.7
Indonesia	141.1	19.9	+609.0	2.7	0.3	+800.0
Knit	7,402.9	5,858.9	+ 26.3	61.5	45.5	+ 35.2
Hong Kong	4,159.3	2,971.1	+ 40.0	21.3	14.0	+ 52.1
Dominican Republic	853.2	424.6	+100.9	10.3	4.5	+128.9
Pajamas, cotton, not knit	455.1	378.0	+ 20.4	18.8	15.6	+ 20.5
Hong Kong	358.2	317.5	+ 12.8	14.8	13.1	+ 13.0
Republic of China	37.6	25.4	+ 48.0	1.5	1.1	+ 36.4
Dressing gowns & robes, not knit, total	353.4	289.1	+ 22.2	22.3	17.6	+ 26.7
Cotton	258.3	193.0	+ 33.8	15.6	10.9	+ 43.1
Hong Kong	109.5	80.0	+ 36.9	4.9	3.1	+ 58.1
Taiwan	29.6	20.5	+ 44.4	1.1	0.8	+ 37.5
Wool or man-made fiber	91.7	93.2	- 1.6	5.9	5.8	+ 1.7
Hong Kong	58.9	46.5	+ 26.7	3.2	2.2	+ 45.4
Republic of China	16.1	14.4	+ 11.8	1.1	1.0	+ 10.0
Silk	3.4	2.9	+ 17.2	0.8	0.9	- 11.1
Hong Kong	1.7	1.5	+ 13.3	0.4	0.4	--

(footnotes continued)

FOREIGN TRADE

Imports

(footnotes continued)

nr = not reported.
nspf = not specially provided for.

*The C.I.F. (cost, insurance, freight) value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
December 1981, 1982.

Exports

U.S. manufacturers of women's and children's innerwear and nightwear exported $137.4 million worth of these goods in 1982, down 14.2% from 1981. The quantity of exports fell 21.2% to 11.6 million dozen units. In general, according to the Bureau of Industrial Economics, apparel exports were off substantially in 1982, principally because of poor economic conditions overseas and a strong dollar. The Bureau estimated that exports accounted for 27% of women's and children's underwear and nightwear shipments in 1982.

Brassiere exports, the largest component of innerwear and nightwear exports, dropped 18.0% in value, to $68.4 million, and 23.8% in the quantity exported, to 7.3 million dozen, in 1982 compared with the prior year. About 54% of the brassieres shipped from American factories were exported in 1982, according to the Department of Commerce. Women's and children's underwear exports were valued at $39.8 million, 16.2% less than in 1981, while the quantity exported slipped 18.9% to 3.3 million dozen.

U.S. Exports of Women's & Children's Innerwear & Nightwear 1981, 1982

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1982	1981	% Change 1982/81	1982	1981	% Change 1982/81
Total, all reported categories	11,597.5	14,715.8	- 21.2%	$137.2	$160.0	- 14.2%
Brassieres, total	7,309.3	9,592.1	- 23.8	68.4	83.3	- 18.0
Cotton	716.0	1,120.9	- 36.1	5.4	9.0	- 40.0
Man-made fibers	5,712.4	7,297.2	- 21.7	53.8	62.5	- 13.9
All other materials	880.9	1,174.0	- 25.0	9.2	11.8	- 22.0

(continued)

FOREIGN TRADE

Exports

U.S. Exports of Women's & Children's Innerwear & Nightwear
1981, 1982
(continued)

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1982	1981	% Change 1982/81	1982	1981	% Change 1982/81
Underwear, total	3,303.9	4,072.1	- 18.9%	$ 39.8	$ 47.5	- 16.2%
Not knit	1,637.3	2,260.4	- 27.6	17.2	20.7	- 16.9
Cotton	221.0	253.1	- 12.7	1.5	1.6	- 6.2
Man-made fibers	456.5	731.9	- 37.6	6.5	8.4	- 22.6
All other materials	959.8	1,275.4	- 24.7	9.2	10.7	- 14.0
Knit	1,666.6	1,811.7	- 8.0	22.6	26.8	- 15.7
Cotton	687.2	534.6	+ 28.5	5.8	6.3	- 7.9
Man-made fibers	838.3	1,002.9	- 16.4	13.9	17.1	- 18.7
All other materials	141.1	274.2	- 48.5	2.9	3.4	- 14.7
Garters, garter belts & suspenders, total	169.4	236.9	- 28.5	1.1	1.2	- 8.3
Body-supporting garments, except brassieres, total	249.5	218.4	+ 14.2	4.9	5.5	- 10.9
Pajamas & other nightwear, total	444.4	470.7	- 5.6	15.0	14.9	+ 0.7
Not knit	216.0	230.9	- 6.4	8.5	7.8	+ 9.0
Cotton	45.4	43.2	+ 5.1	1.5	1.4	+ 7.1
Man-made fibers	140.2	162.4	- 13.7	5.7	5.1	+ 11.8
Wool	4.5	4.2	+ 7.1	0.3	0.3	--
All other materials	25.9	21.1	+ 22.7	1.0	1.0	--
Knit	228.4	239.8	- 4.7	6.5	7.1	- 8.4
Cotton	31.9	39.2	- 18.6	1.0	1.4	- 28.6
Man-made fibers	147.8	146.3	+ 1.0	3.2	3.5	- 8.6
Wool	3.9	12.3	- 68.3	0.1	0.4	- 75.0
All other materials	44.8	42.0	+ 6.7	2.2	1.8	+ 22.2
Robes & dressing gowns, not not knit, total	121.0	125.6	- 3.7	8.0	7.6	+ 5.3
Cotton	56.2	82.3	- 31.7	2.8	4.2	- 33.3
Man-made fibers	61.7	38.8	+ 59.0	5.0	3.2	+ 56.3
Wool	3.1	4.5	- 31.1	0.2	0.2	--

*The export value is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. As defined, the value excludes the cost of loading the merchandise aboard the carrier and also excludes freight, insurance and other charges incurred beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT 410,
December 1981, 1982.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to the Census Bureau, there will be almost 100 million women aged 16 or older in the U.S. by 1990, 7.2% more than in 1983. The largest increase will come in the 35-44 year-old category, which will register an estimated 28.0% jump in numbers in the seven year span (Series II projections).

The median age of women in the U.S. is expected to rise to 34.3 years in 1990 compared with 32.2 years in 1983. By the year 2000, the typical women will be 37.7 years old.

Projections of the U.S. Female Population, 1983, 1990, 2000

	Number (thousands)			% Change		Percent Distribution		
	1983	1990	2000	1990/1983	2000/1990	1983	1990	2000
Total, all ages	120,216	128,234	137,611	+ 6.7%	+ 7.3%	100.0%	100.0%	100.0%
Under 16 years	26,924	28,240	29,175	+ 4.9	+ 3.3	22.4	22.0	21.2
16 years & over	93,293	99,994	108,436	+ 7.2	+ 8.4	77.6	78.0	78.8
16-19 years	7,654	6,704	7,373	- 12.4	+ 10.0	6.4	5.2	5.4
20-34 years	30,925	30,774	26,442	- 0.5	- 14.1	25.7	24.0	19.2
35-44 years	14,940	19,119	21,885	+ 28.0	+ 14.5	12.4	14.9	15.9
45-54 years	11,518	13,051	18,925	+ 13.3	+ 45.0	9.6	10.2	13.7
55 years & over	28,256	30,346	33,811	+ 7.4	+ 11.4	23.5	23.7	24.6
Median age	32.2	34.3	37.7					

NOTE: These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25 No. 922, October 1982

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 14 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships. While there are 46 million women in the U.S. who are five feet three inches or shorter, most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

THE POTENTIAL MARKET

Estimated Number of Women 18 Years of Age & Over
By Height & Weight, 1982
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	86,003	100.0%	19,537	22.7%	38,251	44.4%	28,251	39.2%
Height:								
5'3" or less	46,991	54.6	14,114	16.4	19,622	22.8	13,254	15.4
5'4" - 5'6"	31,068	36.1	4,992	5.8	14,630	17.0	11,446	13.3
5'7" or more	8,004	9.3	430	0.5	3,959	4.6	3,615	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1982 by age compiled prior to the October 1982 report.

RETAIL SALES BY PRODUCT

According to trade sources, the women's inner fashions market was worth approximately $5 billion at retail in 1982, up about 5% over 1981. Sleepwear, with sales of about $2.2 billion, accounted for close to half of the total. Panty sales inched upward to about $1.0 billion although units sold hovered around 600 million pairs in both 1981 and 1982.

Bra sales reached an estimated $1.3 billion in 1981 with about 230 million units sold. In 1980, sales of bras were about $1.2 billion and 220 million units were sold.

RETAIL SALES BY STORE TYPE

The only official information on sales of women's inner fashions and loungewear in specified types of retail outlets is contained in the 1977 Census of Retail Trade. Only stores with payrolls are included in the merchandise line reports and not all store types are required to break down their sales by merchandise category. Due to changes in the classification system, comparative figures for earlier census years are not available.

Brassieres, Girdles & Foundations

Department stores accounted for over 67% of reported sales of women's brassieres, girdles and foundations in 1977. Women's ready-to-wear stores' sales of $204.0 million represented 15.3% of the total.

Brassieres, Girdles & Foundations

Reported Sales of Women's Bras, Girdles & Foundations by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Bras, Girdles & Foundations	35,239	100.0%	$1,333.8	100.0%
Department stores*	7,884	22.4	894.8	67.1
Women's ready-to-wear stores**	14,820	42.1	204.0	15.3
Family clothing stores	8,807	25.0	169.3	12.7
Children's wear stores	118	0.3	0.7	0.1
Mail order houses	3,610	10.2	65.0	4.8

* Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarter operations, which are included in mail order house data.

**Detailed data on merchandise line sales of women's accessory & specialty stores (including furriers) were not included in the Census reports. There were a total of 4,962 stores in this classification with total women's and children's wear sales of $858.8 million in 1977.

***Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977
Merchandise Line Sales, RC77-L.

RETAIL SALES BY STORE TYPE

Lingerie, Sleepwear & Loungewear

In 1977, sales of women's lingerie, sleepwear and loungewear were reported at $2.14 billion in the leading store types. Department stores again took the lions' share with reported sales of $1.48 billion, 69.2% of the total.

Reported Sales of Women's Lingerie, Sleepwear & Loungewear by Store Type, 1977
(includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number***	% of total	Mil. $	% of total
Lingerie, Sleepwear & Loungewear	38,826	100.0%	$2,143.8	100.0%
Department stores*	8,284	21.3	1,483.7	69.2
Women's ready-to-wear stores**	17,637	45.4	357.4	16.7
Family clothing stores	9,187	23.7	214.9	10.0
Children's wear stores	117	0.3	0.9	#
Mail order houses	3,601	9.3	86.9	4.1

(See footnotes on page 21.)

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC 77-L

Contribution of Women's Inner Fashion Sales to Total Women's & Children's Wear in Key Store Types Reporting Sales, 1977

	Total Women's & Children's Wear Sales* (mil. $)	% of sales accounted for by:	
		Bras, Girdles & Foundations	Lingerie, Sleepwear & Loungewear
Department stores	$ 16,250.7	5.5%	9.1%
Women's ready-to-wear stores**	11,066.5	1.8	3.2
Family clothing stores	3,471.6	4.9	6.2

* Excludes footwear sales.

** Excludes sales in women's accessory and specialty stores.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales, RC 77-L.

RETAIL SALES BY STORE TYPE

Department Stores

While sales of all types of female apparel rose 8.8% in the typical department store with store sales in excess of $1 million, women's, misses' and juniors' intimate apparel sales increased 14.6% and brassiere sales gained 12.8% over 1981.

As a percent of sales, the median markdowns taken in the various innerwear and nightwear departments included in the National Retail Merchants annual survey were considerably below the 20.9% median taken for all female apparel.

Selected Merchandising & Operating Results of Innerwear & Nightwear
Departments in Department Stores With Sales Over $1 Million
(Median Results)

	Adult Female Apparel (113*)	Brassieres (20)*	Corsets & Girdles (23)*	Intimate Apparel, Sleepwear & Robes (109)*
Net sales, % change from last year	+ 8.8%	+ 12.8%	+ 8.3%	+ 9.0%
Sales, % to total store sales	24.5	1.2	0.4	3.5
Sales, % of merchandise division**	--	9.8	3.5	28.0
$ sales per square foot of selling space (main or largest selling unit)	$129.2	na	$111.2	$113.0
Markdowns, retail, % of sales	20.9	3.2	3.5	9.4
Number of stock turns (times)	3.8	2.8	2.9	3.7
Sales promotion, % of sales	2.9	na	3.6	2.6

	Women's, Misses' & Juniors' Intimate Apparel (89)*	Sleepwear (84)*	Robes & Loungewear (84)*
Net sales, % change from last year	+ 14.6%	+ 9.2%	+ 3.9%
Sales, % to total store sales	1.4	1.2	0.7
Sales, % of merchandise division**	11.7	10.3	6.2
$ sales per square foot of selling space (main or largest selling unit)	$105.3	$128.0	$104.4
Markdowns, retail, % of sales	5.7	10.1	13.9
Number of stock turns (times)	3.5	4.3	4.4
Sales promotion, % of sales	2.5	2.8	3.0

na = not available.
* Number in parentheses refers to the number of reporting firms in each category.
**The merchandise division (equal to 100%) is adult female intimate apparel and accessories.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981 (1982 Edition).

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Women's, misses' and juniors' intimate apparel sales in specialty stores with sales over $1 million rose 13.7% in 1982 compared with a year earlier, according to the National Retail Merchants Association's Merchandising and Operating Results report. During the same time, bra, corset and girdle department sales were up 8.3%, loungewear and robes department 8.4% ahead and sleepwear department sales up 6.3% in comparison with a 6.7% median rise for all female apparel areas in these specialty stores.

Selected Merchandising & Operating Results of Innerwear & Nightwear Departments in Department Stores With Sales Over $1 Million, 1981
(Median Results)

	All Female Apparel (47)*	Bras, Corsets & Girdles (28)*	Intimate Apparel, Sleepwear & Robes (35)*	Women's, Misses' & Juniors' Intimate Apparel (17)*	Sleepwear (16)*	Loungewear & Robes (20)*
Net sales, % change from last year	+ 6.7%	+ 8.3%	+ 6.3%	+ 13.7%	+ 6.3%	+ 8.4%
Sales, % to total store sales	50.7	2.1	4.8	2.4	1.9	1.8
Sales, % of merchandise div.**	--	13.0	33.0	11.7	12.4	10.8
$ sales per square foot of selling space (main or largest selling unit)	$147.1	$135.3	$123.7	$148.4	$128.4	$141.7
Markdowns, % of sales	20.9	5.2	13.6	5.6	12.8	19.6
Number of stock turns (times)	3.5	2.2	3.3	2.9	4.8	4.1
Sales promotion, % of sales	2.4	2.6	2.8	na	na	2.7

na = not available.
* Numbers in parentheses refer to the number of reporting firms in each category.
**The merchandise division (equal to 100%) is adult female intimate apparel and accessories.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1981 (1982 Edition).

SEASONAL PATTERN IN RETAIL SALES

The heaviest selling period of the year for women's innerwear is during the Christmas season. Except for corsets and brassieres, whose sales are more evenly distributed throughout the year, all of the other innerwear items listed registered sales of over 20% for the month of December.

SEASONAL PATTERN IN RETAIL SALES

Percent of Year's Sales of Lingerie, Foundation & Loungewear Departments By Months
(Five Year Average*)

	Corsets & Brassieres	Underwear, Slips & Negligees, Total	Knit Underwear	Woven Underwear, Slips & Nightgowns	Negligees, Robes & Loungewear
Total	100.0%	100.0%	100.0%	100.0%	100.0%
January	7.7	5.3	6.2	5.1	4.1
February	6.3	5.2	5.4	5.2	5.0
March	8.2	6.0	6.1	6.1	5.9
April	8.5	6.5	6.5	6.7	6.2
May	8.9	8.7	9.6	8.8	8.5
June	9.5	7.4	7.5	7.9	6.6
July	7.9	6.5	6.4	6.8	5.5
August	7.7	6.2	6.4	6.1	5.4
September	8.3	6.3	6.5	6.1	5.8
October	8.6	7.4	7.5	7.3	7.1
November	7.8	10.8	10.1	10.2	12.1
December	10.6	23.7	21.8	23.7	27.8

Source: Newspaper Advertising Bureau based on Federal Reserve Board reports (covering 1961-1965).

RETAIL ADVERTISING

Percent of Total Newspaper Advertising Linage Done by Month, 1981

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Girdles & bras	5.1%	5.4%	10.9%	9.0%	10.7%	9.6%	4.2%	7.3%	6.7%	9.3%	7.5%	14.3%
Lingerie, sleepwear & robes	5.1	5.9	6.5	8.1	14.2	4.7	4.7	4.8	5.9	7.3	14.2	18.6

Source: The Advertising Checking Bureau, Inc. Neustadt Reports Division, covering retail newspaper advertising linage in all newspapers in seven cities: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington.

CONSUMER PRICE INDEX

Consumer Price Index for Women's Inner Fashions
1980-1982 & January-June 1983
(1967=100 unless otherwise indicated)

	January-June 1983 Average	Annual Average 1982	1981	1980	% Change 6 months 1983/1982
All items	295.1	282.5	260.5	246.8	+ 4.5%
All apparel less footwear	178.1	177.0	174.0	167.8	+ 0.6
All women's apparel (1977=100)	105.0	105.5	104.3	103.1	- 0.5
Women's underwear, nightwear & hosiery (1977=100)	131.1	128.2	120.4	113.0	+ 2.3

Source: Bureau of Labor Statistics

CONSUMER BUYING HABITS

Data on the purchases of specified women's inner fashions, shown on the following pages, have been compiled by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on the findings of an on-going monthly panel diary, tracking the purchases of 6,500 nationally representative families. Purchases for women aged 14 and over are included in the data.

Bras were purchased by 5.4% of panel households in the typical 1981 month, with 5% of households purchasing panties and 4.8% nightwear and robes.

Percent of Households Purchasing Specified Inner Fashion Items
By Month, 1981

	Bras	Panties	Girdles & Other Control Garments	Slips & Lingerie	Nightwear & Robes
January	5.2%	5.0%	1.0%	1.4%	4.8%
February	4.5	3.8	0.7	1.3	3.7
March	5.5	5.2	1.0	1.7	3.7
April	6.0	4.7	1.1	2.7	4.0
May	5.5	5.6	1.1	2.6	4.8
June	6.9	5.5	1.1	2.1	4.1
July	6.4	5.9	0.8	2.1	4.1
August	6.0	6.1	0.7	1.8	3.0
September	5.4	4.7	0.8	1.6	3.7
October	4.5	4.5	0.8	1.5	4.0
November	3.6	4.0	0.8	2.2	6.6
December	5.1	4.9	0.9	2.5	11.6
Average month	5.4	5.0	0.9	2.0	4.8

Source: Newspaper Advertising Bureau, 1983 Newspaper Advertising Planbook.

CONSUMER BUYING HABITS

Women's Innerwear

Percent of Purchases of Women's Innerwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1981, 1982
(For women aged 14 & over)

	Bras				Panties			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchases by Outlet Type:								
Department stores	27.5%	28.2%	38.8%	39.1%	20.7%	21.5%	28.4%	30.3%
National chains	30.3	31.8	27.5	29.0	23.6	29.2	23.3	27.1
Discount stores, incl. K mart	26.0	23.9	15.6	14.3	32.9	30.2	24.5	22.7
Women's specialty stores	7.4	8.2	10.0	10.8	6.4	5.6	8.3	7.5
All other store types	8.9	7.9	8.2	6.7	16.4	13.6	15.4	12.5
Purchases by Fiber:								
100% polyester	23.4	24.3	23.5	24.0	9.4	11.4	7.3	9.1
Polyester blends	10.5	10.3	10.3	9.9				
100% cotton/cotton blends	4.1	3.5	4.2	4.1	26.9	23.0	25.4	22.9
100% nylon	32.7	34.0	32.4	32.6	39.9	41.1	40.3	40.9
Nylon blends	21.6	19.6	20.7	19.5	9.6	7.9	13.3	11.2
All other fibers	7.7	8.3	8.8	9.9	14.2	16.6	13.7	15.9
Purchases by Month:								
January	8.7	7.8	7.9	7.6	6.9	8.1	7.1	7.3
February	6.8	7.2	6.9	6.5	6.7	6.1	6.2	5.9
March	8.9	8.9	9.0	8.4	8.5	8.6	7.5	7.4
April	8.3	8.8	8.8	8.4	7.5	7.4	8.2	7.6
May	8.9	9.1	8.7	9.6	7.8	8.9	7.9	9.2
June	9.1	10.1	9.3	10.1	8.0	9.0	7.9	9.3
July	9.1	10.4	8.8	9.9	9.6	9.1	9.5	9.9
August	9.2	9.2	9.2	8.9	9.2	9.7	9.2	9.1
September	7.7	7.4	7.2	8.1	7.2	8.6	7.6	9.1
October	7.3	7.1	7.3	8.0	7.7	8.2	8.2	8.1
November	7.1	5.5	7.0	5.8	8.6	7.0	8.3	7.5
December	8.8	8.5	10.0	8.6	12.2	9.4	12.5	9.8

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Women's Innerwear

Percent of Purchases of Women's Innerwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1981, 1982

(For women aged 14 & over)

	Slips				Girdles & Other Foundations*			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchases by Outlet Type:								
Department stores	33.5%	31.4%	40.8%	36.9%	37.9%	33.0%	38.3%	39.8%
National chains	17.8	25.3	17.3	25.0	24.2	22.3	25.4	27.8
Discount stores, incl. K mart	22.0	20.6	14.9	14.0	18.4	25.1	10.4	10.9
Women's specialty stores	14.5	13.9	16.7	15.8	8.5	8.9	14.4	12.3
All other store types	12.2	8.7	10.3	8.3	11.0	10.7	11.5	9.3
Purchases by Fiber:								
100% polyester/polyester blends	8.6	5.8	9.4	6.3	4.9	6.3	7.7	6.7
100% nylon/nylon blends	86.7	89.3	84.4	88.9	69.6	78.0	70.8	75.9
All other fibers	1.6	1.8	2.0	1.5	20.1	11.7	15.0	11.7
No answer	3.1	3.1	4.2	3.3	5.4	4.0	6.5	5.7
Purchases by Month:								
January	5.7	5.9	5.1	5.8	6.6	6.2	7.9	7.1
February	4.7	5.4	4.2	4.5	5.7	5.2	7.3	5.3
March	7.3	8.2	6.8	8.3	5.7	10.0	5.7	6.6
April	9.2	8.7	9.5	8.8	8.7	8.7	10.4	10.5
May	10.2	12.3	10.2	12.1	5.0	10.2	7.0	12.9
June	8.8	9.1	9.0	8.5	11.3	13.4	11.6	9.8
July	8.7	7.5	7.9	6.4	11.3	7.9	9.2	7.3
August	8.3	8.6	8.1	7.7	7.4	7.7	6.1	7.1
September	7.3	7.9	7.2	8.9	6.6	7.2	7.9	7.8
October	8.2	7.4	8.5	8.6	7.1	8.1	7.7	9.6
November	7.2	8.9	7.5	9.0	8.7	7.3	10.7	6.9
December	14.5	10.2	16.0	11.4	15.9	8.2	8.6	9.1

* Includes pants liners, all-in-ones and other control garments.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Women's Innerwear

Percent of Purchases of Women's Innerwear By Price Points, 1981, 1982

	Bras				Girdles & Other Foundations*			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Less than $4.00	39.3%	41.7%	17.4%	19.0%	35.9%	33.6%	8.3%	9.6%
$4.00 - 8.99	37.7	39.9	38.8	43.9	28.1	32.5	22.2	27.0
$9.00 & over	22.9	18.4	43.8	37.1	36.1	34.0	69.5	63.4

	Panties			
	Units		Dollars	
	1982	1981	1982	1981
Less than $1.00	30.0%	37.5%	13.6%	18.3%
$1.00 - 1.99	46.3	44.3	41.9	44.3
$2.00 - 3.00	16.2	13.0	23.1	21.2
$3.00 & over	7.5	5.2	21.5	16.1

	Slips			
	Units		Dollars	
	1982	1981	1982	1981
Less than $6.00	40.9%	49.3%	22.7%	30.0%
$6.00 - 9.99	36.3	32.8	36.6	35.7
$10.00 & over	22.8	17.8	40.7	34.4

* Includes pants liners, all-in-ones and other control garments.

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1981, 1982

(For women aged 14 & over)

	Negligees				Hostess/Loungewear			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchases by Outlet Type:								
Department stores	29.3%	25.4%	37.7%	32.5%	25.7%	32.4%	30.5%	39.5%
National chains	23.0	23.5	23.2	23.9	27.5	20.2	24.4	20.4
Discount stores, incl. K mart	29.9	29.7	19.2	18.5	26.9	26.8	17.3	17.0
Women's specialty stores	9.5	11.4	11.5	15.1	8.5	11.6	12.9	12.5
All other store types	8.3	10.0	8.4	10.0	11.4	9.0	14.9	10.6

(continued)

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1981, 1982

(For women aged 14 & over)
(continued)

	Negligees				Hostess/Loungewear			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchases by Fiber:								
100% polyester/polyester blends	25.4%	24.6%	26.3%	24.3%	58.5%	47.7%	61.2%	48.5%
100% cotton/cotton blends	14.4	10.5	15.0	10.3	6.8	6.6	10.8	10.5
100% nylon/nylon blends	35.9	41.0	36.9	43.7	12.1	9.8	9.4	8.2
Acetate blends	18.8	17.9	14.8	15.1	14.3	23.9	10.2	19.6
All other fibers	1.1	1.2	1.2	0.9	4.3	6.5	5.1	5.9
No answer	4.4	4.8	5.8	5.7	4.0	5.5	3.3	7.3
Purchases by Month:								
January	6.1	7.0	6.0	6.5	3.3	2.2	3.6	2.8
February	6.3	4.8	6.6	4.0	6.5	6.6	6.7	6.7
March	4.7	6.0	4.6	5.1	10.8	9.6	10.5	8.9
April	5.7	6.4	4.9	5.6	8.8	9.1	10.2	10.9
May	8.0	8.6	7.4	7.2	10.7	12.8	11.8	13.8
June	4.7	6.3	4.7	5.7	8.5	9.7	5.7	8.7
July	6.6	7.8	6.2	6.8	13.5	9.6	8.6	6.9
August	5.9	5.6	5.3	5.7	5.9	9.3	4.9	7.5
September	6.7	6.2	6.4	6.7	7.6	6.4	8.0	6.4
October	9.0	7.0	8.5	6.4	7.9	3.6	7.5	5.0
November	13.9	12.5	14.8	15.0	4.2	6.2	4.9	6.1
December	22.4	22.0	24.6	25.3	12.2	15.1	17.7	16.3

	Robes*				Pajamas			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchase by Outlet Type:								
Department stores	26.7%	26.6%	33.1%	33.1%	27.6%	26.7%	35.2%	34.8%
National chains	24.4	26.3	24.0	26.2	31.7	37.0	30.0	33.8
Discount stores, incl. K mart	27.4	26.0	19.8	19.0	25.5	17.7	17.9	12.8
Women's specialty stores	12.9	12.7	15.7	14.3	9.5	10.9	10.2	11.6
All other store types	8.6	8.4	7.4	7.4	5.7	7.7	6.8	7.1

(continued)

Women's Nightwear

Percent of Purchases of Women's Nightwear by Type of Outlet, Fiber Content & Monthly Purchase Pattern, 1981, 1982

(For women aged 14 & over)
(continued)

	Robes*				Pajamas			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Purchases by Fiber:								
100% polyester/polyester blends	47.5%	44.6%	47.1%	41.2%	26.5%	25.3%	20.7%	27.4%
Acetate blends	27.1	27.1	27.7	27.8	10.9	13.4	10.3	11.3
100% cotton/cotton blends	4.2	3.6	3.8	3.3	31.3	24.0	24.2	20.0
100% nylon/nylon blends	10.2	9.2	9.5	9.7	23.5	29.4	29.4	32.8
100% acrylic/acrylic blends	6.5	8.5	6.3	10.6	4.7	3.8	7.1	5.5
All other fibers	--	0.5	--	0.8	--	0.7	--	0.2
No answer	4.6	6.5	5.7	6.6	3.0	3.4	4.3	2.8
Purchases by Month:								
January	9.6	7.6	9.0	7.1	6.0	6.5	5.8	4.7
February	5.4	6.9	5.1	5.8	4.5	6.5	4.0	4.9
March	6.8	5.9	5.0	5.0	6.8	5.5	6.8	4.2
April	4.9	7.4	4.3	5.9	4.1	4.7	3.4	4.8
May	10.2	9.0	8.7	7.3	6.3	6.4	5.5	6.9
June	7.9	6.5	7.2	6.0	6.1	7.8	6.0	8.3
July	7.5	7.5	6.1	6.1	7.7	5.1	7.2	4.0
August	5.3	5.0	5.0	4.0	3.8	5.4	5.0	5.0
September	3.9	4.7	3.9	4.3	5.9	4.5	4.9	4.9
October	5.8	4.6	6.1	5.0	10.1	10.8	8.6	9.8
November	10.4	11.0	12.6	14.0	17.1	11.0	16.1	11.2
December	22.3	23.9	27.2	29.6	21.7	25.9	26.8	31.5

* Includes housecoats, beach robes and beach coverups.

Source: NPD Special Industry Services.

Percent of Purchases of Women's Nightwear By Price Points, 1981, 1982

	Negligees				Pajamas			
	Units		Dollars		Units		Dollars	
	1982	1981	1982	1981	1982	1981	1982	1981
Less than $6.00	30.9%	40.9%	13.8%	19.8%	33.1%	37.9%	15.0%	17.9%
$6.00 - 9.99	32.3	30.4	26.0	27.2	33.2	32.2	28.7	30.2
$10.00 & over	36.8	28.7	60.2	53.0	33.7	29.9	56.3	51.9

(continued)

Women's Nightwear

Percent of Purchases of Women's Nightwear By Price Points, 1981, 1982

	Robes			
	Units		Dollars	
	1982	1981	1982	1981
Less than $10.00	25.5%	27.8%	10.8%	12.6%
$10.00 - 15.99	29.5	30.3	22.8	25.0
$16.00 - 24.99	28.4	29.2	33.4	36.8
$25.00 & over	16.7	12.7	33.0	25.5

	Hostess/Loungewear			
	Units		Dollars	
	1982	1981	1982	1981
Less than $7.99	34.8%	27.4%	14.5%	11.6%
$8.00 - 15.99	36.7	45.3	32.8	39.2
$16.00 & over	28.6	27.4	52.7	49.2

According to a Gallup survey undertaken for Apparel Merchandising, department stores were the favored outlet for sleepwear purchases across all income groups in 1982. In households with total incomes of $25,000 or more, 51.3% purchased sleepwear in a department store. Only 11.4% bought sleepwear in the second most favored outlet, J.C. Penney.

Place of Purchase of Women's Sleepwear by Household Income of Purchaser, 1982

	Household Income			
	Under $10,000	$10,000- $14,999	$15,000- $24,999	$25,000 & over
Department stores	30.2%	39.8%	44.3%	51.3%
Discount stores	29.4	21.7	10.7	10.1
J.C. Penney	11.9	16.9	12.2	11.4
Sears	7.1	6.0	13.7	6.3
Women's specialty stores	4.8	1.2	5.3	8.9
Lingerie shops	0.8	--	0.8	3.8
Off-price stores	0.8	2.4	2.3	0.6
Catalog/mail order	1.6	--	1.5	0.6
All other stores	3.2	10.8	1.5	5.7
Don't know	10.3	1.2	7.6	1.3

Source: Gallup Organization (Chain Store Age Apparel Merchandising, May 1983)

CONSUMER BUYING HABITS

Women's Nightwear

Number of Sleepwear Purchases by Age of Purchaser, 1982

	Age Groups				
	18-24 Years	25-34 Years	35-44 Years	45-49 Years	50+ Years
3 or 4 times a year	8.0%	16.3%	10.3%	10.9%	5.7%
Twice a year	30.0	19.2	20.7	10.9	16.7
Once a year	35.4	29.1	25.0	50.0	25.3
Every other year	8.8	8.7	12.1	18.8	12.8
Less often than every other year	8.0	10.5	16.4	3.1	8.2
Never	9.7	14.0	15.5	6.3	22.1
Don't know	--	2.3	--	--	1.4

Source: Gallup Organization (Chain Store Age Apparel Merchandising, May 1983).

Women's Inner Fashions

Seventeen Magazine's Back-To-School survey, conducted in September 1982, projected purchases of inner fashions by 1,505 respondents who attend high school or college to the universe of 8.7 million teenage female students. According to the study, expenditures for inner fashions during the back-to-school period were approximately $637.7 million, 8.1% of the estimated $7.9 billion spent on apparel at this time.

Projected Purchases of Inner Fashions by Teenage Female Students

	Number Purchasing (Thous.)	Number Purchased (Thous.)	Total Expenditures (Mil. $)
FOUNDATIONS			
Bras, total	6,253	17,906	$ 158.6
Bandeau:			
- softcup	3,603	8,304	70.7
- light-padded	1,921	4,230	32.1
- underwire	1,218	2,500	29.5
Strapless/halter	895	1,070	7.5
One-size (stretch step-in)	324	779	4.9
Stretch coordinated sets (bra & brief)	430	1,023	13.8
Panty, brief girdle	213	775	3.8
Bodysuit - sized	200	290	4.1
One-size stretch	193	240	2.6
Total girls buying foundations	6,342	19,211	169.1

(continued)

CONSUMER BUYING HABIRS

Women's Inner Fashions

Projected Purchases of Inner Fashions by Teenage Female Students (continued)

	Number Purchasing (Thous.)	Number Purchased (Thous.)	Total Expenditures (Mil. $)
LINGERIE			
Panties - bikini	4,165	21,098	59.5
- regular	1,945	9,753	28.5
- brief	768	3,079	8.5
Slips - short	1,261	1,675	16.8
- long	442	522	5.6
- bra	702	1,430	12.4
Half slips - short	1,203	1,546	14.3
- long	281	311	3.3
Other	117	182	1.5
Total girls buying lingerie	6,422	39,596	150.4
SLEEPWEAR/LOUNGEWEAR			
Nightgowns - long	1,239	1,805	28.2
- short	833	1,068	13.6
Nightshirts - short	1,892	2,851	30.5
- long	626	1,011	10.8
Pajamas - shortie	561	805	10.0
- full-length	626	868	13.5
Robes - long	956	1,063	28.5
- short	469	485	8.5
Long culottes/lounging pajamas/ at-home dresses	250	360	4.8
Other	122	139	1.9
Total girls buying sleepwear/loungewear	4,137	10,455	150.4
Total girls buying sleepwear	3,773	8,408	106.6
Total girls buying loungewear	1,430	2,047	43.7

Source: Seventeen Magazine
Back-To-School Study, 1983

FAIRCHILD FACT FILES AVAILABLE FOR 1983

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1982 Edition available now -- 1983 Edition will be available in January, 1984)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1982 Edition available now -- 1983 Edition will be available in December, 1983)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and findings in a comprehensive consumer survey conducted by Footwear News Magazine. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers, on production and value of shipments of major types of soft surface floor coverings, and foreign trade, are covered in this report. Retailing information includes departmental merchandising and operating results, estimated volume by type of outlet and trends in consumer buying.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1982, $15.00)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (October)

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $12.50, except Special Editions. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.